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ABSTRACT

This booklet, one of six that compose the Peace Corp's programming and training (P&T) guidelines, provides information and ideas on ways to increase each post's effectiveness through linking P&T. An introduction discusses the direct impact that P&T have on the success of each other, since, at the Peace Corps, programming drives training, and training informs programming. Section 2 provides an overview of P&T integration. The following nine sections cover the points of integration that occur when staff members design, review, and revise the project plan; conduct task analyses and develop competencies; design and implement training events; select staff for P&T; orient and develop staff; select training sites and develop community resources; assess trainees and PCVs; assess training; assess programming; document P&T; participate in planning and budgeting processes; request resources to support P&T; and request volunteers. A final section discusses challenges of integrating P&T. Appendixes include acronyms; glossary; P&T integration checklist; training informs programming scenarios; sample timeline; training continuum; types of Peace Corps training; description of work format; materials for Pre-Service Training; and questions to guide action planning and resource planning for training. (YLB)

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Programming and Training Booklet 6

How to Integrate Programming and Training

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Programming and Training

Booklet 6

How to Integrate
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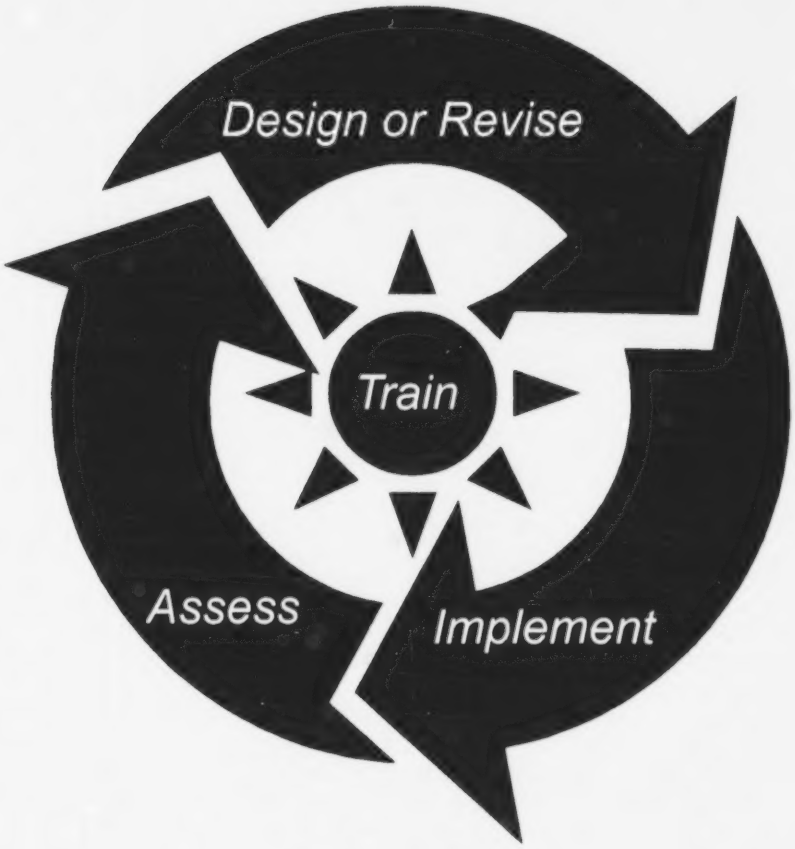

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Programming and Training
Booklet 6
How to Integrate Programming and Training

Peace Corps
2003

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Preface

The Peace Corps' programming and training guidelines are composed of six booklets. The booklets provide agency-wide programming and training (P&T) guidance for Peace Corps staff and project partners.

Booklet 1: Programming and Training: The Basics is an overview of the Peace Corps' approach to programming and training.

Booklet 2: How to Design or Revise a Project offers a step-by-step approach for designing or revising a project, beginning with analyzing the situation in a country and ending with a complete project plan.

Booklet 3: How to Integrate Second and Third Goals Into Programming and Training provides ideas on how to integrate the Peace Corps' cross-cultural second and third goals into programming and training.

Booklet 4: How to Assess a Project shows how to design and implement a monitoring and evaluation plan.

Booklet 5: How to Implement a Project provides guidance, tips, and tools to use in implementing a project, including information on site development, how to train and support Volunteers, and the agency's planning and budgeting system.

Booklet 6: How to Integrate Programming and Training presents points at which programming and training link to prepare and support trainees and Volunteers in their service.

The Peace Corps first developed agency guidelines for programming and training through the production of the *Programming and Training System (PATS)* in 1990. In response to feedback from posts, numerous field and headquarters staff revised and updated the publication. The Peace Corps gratefully acknowledges the contributions of everyone who participated in the development and production of this manual.

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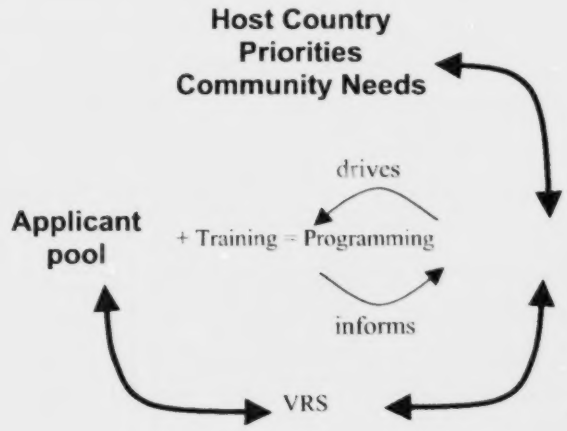
Introduction

Booklets 1 through 5 in this series deal with various aspects of the programming of Peace Corps projects: designing and revising the project, implementing the project, and monitoring and evaluating the project's progress and results. This booklet provides information and ideas on ways to increase each post's effectiveness through linking programming and training.

Programming and training have a direct impact on the success of each other. At the Peace Corps,

- programming drives training, and
- training informs programming.

The diagram and explanation below illustrate the relationship between programming and training and the other elements that affect them.



The purpose of training is to prepare and support trainees and Volunteers during their two years of service. Therefore, training reflects the goals and objectives of specific project plans and the tasks that Volunteers perform. Programming staff works with training staff to build training curricula that are based on the tasks and competencies that Volunteers need to be effective.

At the same time that programming drives training, training guides or informs programming. For example:

- Training staff counsel programming staff on the knowledge, skills, and attitudes (KSAs) that can be developed before and during service to meet project goals and objectives.
- Training staff identify a timeline for developing competencies. This helps programming staff understand which of the project objectives can be met at the beginning, middle, and end of a Volunteer's service.
- Training staff provide programming staff with information that helps place trainees at appropriate sites.

- Training staff provide programming staff with ideas for ongoing formal and informal skills development during each Volunteer's service.

Programming and training also are affected by other factors. For example:

- Each project plan reflects the host country's priorities as well as community needs.
- The project plan also reflects the applicant pool plus the training that the Peace Corps provides.

Taking all these elements into account, programming staff request from Volunteer Recruitment and Selection (VRS) Volunteers who have the skills required for the project as well as Volunteers who can be trained in the skills needed.

If the applicant pool does not reflect the skill levels needed for a project, and if the skills cannot be gained in-country through training and experience, staff review and revise the project plan with participation from the host country.

The diagram above illustrates these links among host country, programming, training, and recruitment and selection.

Overview of Programming and Training Integration

The word "integrate" means to combine or bring together into a whole so that all the elements support one another. In the context of programming and training, integration refers to how programming and training staff ensure that these two functions reflect and support each other throughout the life of a project. While this booklet emphasizes the areas where programming and training staff collaborate, it is important to note that Volunteers, other staff at post and headquarters, and project partners add valuable input and feedback to various aspects of programming and training.

The successful integration of programming and training relies on teamwork. Because Peace Corps posts throughout the world use different staffing patterns, how integration is carried out varies from post to post. All posts have associate Peace Corps directors (APCDs) or program managers who are responsible for projects. Some posts also have program assistants who support one or more projects. Programming staff become a part of the training team during Pre-service Training (PST). They also are involved in the training events, workshops, and conferences that happen between PST and close of service (COS).

Some posts have full-time staff who manage training year-round. Training staff might include a training manager or director, a cross-cultural coordinator, and a language coordinator. Posts also hire part-time staff as their needs dictate. During pre-service training, for example, additional staff might include a PST director, language trainers or facilitators, technical coordinators or trainers, and logisticians. If there are two or three PSTs per year, language and technical trainers are often hired full time. Some posts contract their training with outside organizations. Some posts have a program and training officer (PTO). A part of the PTO's role is to facilitate the integration of programming and training.

Because staffing patterns and roles and responsibilities differ, this booklet uses the generic terms *programming staff* and *training staff*. Each post needs to identify which of its staff or contractors are responsible for the points where it is important for programming and training staff to collaborate. These points of integration occur when staff members

- Design, review, and revise the project plan.
- Conduct task analyses and develop competencies.
- Design and implement training events.
- Select staff for programming and training.
- Orient and develop staff.
- Select training sites and develop community resources.
- Assess trainees and Volunteers.
- Assess training.
- Assess programming.
- Document programming and training.
- Participate in planning and budgeting processes.
- Request resources to support programming and training.
- Request Volunteers.

Each of these areas is covered in the following pages.

For a checklist of activities where programming and training integrate, see Appendix 3, Programming and Training Integration Checklist.

For examples of how training informs programming, see Appendix 4: Training Informs Programming Scenarios.

Project Plan Design, Review, and Revision

Projects evolve over time based on host country priorities, community needs, and the kinds of Volunteers that the Peace Corps can recruit and train. Staff continually discuss what they observe in the field, what they read in reports, and what they hear when groups of Volunteers and/or project partners convene. By involving other staff, Volunteers, and project partners, programming staff are able to assess the effectiveness of the project from different perspectives. Some posts convene a project advisory committee (PAC) to help in designing, reviewing, or revising programming.

For information on how to design or revise a project, see *Booklet 2: How to Design or Revise a Project* (ICE No. T0114).

Task Analysis and Competency Development

The project plan is the base from which programming and training staff build the training design. They

- start with the project framework's purpose, goals, and objectives;
- conduct a task analysis; and
- develop competencies.

Each of these steps for designing training is described below.

Start With the Project Framework

Each project plan has a framework that states the purpose, goals, and objectives of the project. The purpose describes the broad desired improvement in people's lives that will result from the project. Goals state the conditions that need to occur to achieve the project's purpose. Objectives describe the major activities that Volunteers and their community partners will do and the changes desired from those activities. It is from the major activities that programming and training staff identify Volunteer tasks and competencies. Competencies are the knowledge, skills, and attitudes (KSAs) that Volunteers need to be successful. These competencies drive the content of training sessions and other learning experiences.

Conduct a Task Analysis

A task is something a Volunteer does that contributes to the success of the project. A task analysis answers the question "What do Volunteers do in order to meet each objective in the project plan?" While programming staff are usually responsible for conducting a task analysis, it is helpful to include training staff, Volunteers, and community partners in the process for the following reasons:

- Training staff use the information to design the training program, from PST to COS. Involving trainers in the task analysis provides them firsthand knowledge of what Volunteers do in the field and the challenges and opportunities that they face.
- Volunteers know what is happening in the field, what activities or tasks are effective, what activities or tasks are not effective, and how tasks

may be changing.

- Project partners provide a different perspective and help Peace Corps staff understand how Volunteers can be more effective at work and in their communities.

Staff use the following steps as they and their colleagues conduct a task analysis:

Step 1. The task analysis team asks questions for each of the key training components (technical, language, cross-cultural, personal health, and safety and security).

The following are examples of questions:

- What should Volunteers do in the technical part of their jobs?
- How should they plan for the sustainability of projects?
- What language do they need to use, including vocabulary related to survival, social, technical, health, and safety and security issues?
- What do they need to know about local customs, values, and beliefs in order to work within the culture?
- What should Volunteers do in order to enter effectively into a community and build relationships?
- What do they need to do to maintain personal health?
- What do they need to do to maintain safety and security?
- What do they need to do as they prepare to leave their communities?

The following are examples of tasks from different sectors:

TEFL: Design sessions on self-esteem that combine English grammar points and student interests.

Health: Conduct a community assessment to identify health needs of women and children and community strengths.

Small enterprise development: Deliver sessions for small business entrepreneurs on ways to market their products.

Agriculture: Teach hillside farmers the A-frame method of contour planting.

Step 2. To obtain information that answers the questions above, the team

- interviews Volunteers one on one or in groups in the field, in the office, and at training events;
- interviews project partners;
- interviews sector specialists;
- observes Volunteers in the field; and
- reads Volunteer documents, including quarterly reports, descriptions of service (DOS), and journals.

The following is an example of information that might come from a task analysis for agriculture Volunteers in Jamaica.

The objective of the project might be as follows:

By 2008, 50 Volunteers and their community partners will have taught 200 small hillside farmers in new yam-planting techniques. This will result in 50 percent of the farmers using new yam-planting techniques and a 25 percent increase in yam production.

From asking questions and making observations, programmers and trainers might identify the following tasks:

- ✓ *Volunteers use new yam-planting techniques.*
- ✓ *They use the* Farmers Almanac *and can explain how it influences what farmers do.*
- ✓ *They know how to approach, talk to, and build trust with farmers.*

- ✓ *They know what will motivate farmers to attend demonstrations and to use the new planting techniques.*
- ✓ *They know what areas are not safe to travel through or to frequent.*

Step 3. The task analysis team then clusters and prioritizes the tasks.

Based on input from Volunteers and project partners, the team lists the tasks in chronological order (see Appendix 5: Sample Timeline). This process is especially helpful to trainers who need to know what must be covered in PST to prepare Volunteers for their first three to six months at site. It also helps staff identify what can be covered in later training events. The team prioritizes the list of tasks by importance, frequency, and level of skill required. Knowing the importance and frequency helps trainers give appropriate emphasis to particular areas. Knowing the level of difficulty enables trainers to design activities that begin with less complex skills and then build to more difficult tasks.

Step 4. The task analysis team verifies the tasks.

Staff ask Volunteers to review the list of tasks periodically, especially if there have been changes in the project. This helps identify which tasks continue to be important, which have taken a lesser role, which no longer take place, and what new tasks are required. This is often done at in-service trainings and COS conferences. It can also be done when programming and training staff make site visits. The list may be sent to Volunteers and project partners for comments. It is critical that programming and training staff share this information, since it has a direct impact on training and tells programming staff how the project plan is being carried out in the field.

The task analysis also helps programming staff write a Volunteer Assignment Description (VAD) for each project. The VAD outlines the responsibilities, activities, work objectives, and other information that helps Volunteer Recruitment and Selection staff recruit, select, and place Volunteers. And it helps other staff at headquarters design training materials that are used before and during staging.

Develop Competencies

The task analysis leads to the development of competencies. A competency includes the basic knowledge, skills, and attitudes (KSAs) that enable a Volunteer to perform a given task effectively.

Competencies usually are categorized by training component (technical, language, cross-cultural, personal health, or safety and security). Staff from programming, training, medical, and administrative units come together to write the initial list of competencies. This helps ensure that each of the components is appropriately included for each task.

For an example of a task-to-competency worksheet, refer to Appendix 6.

The following is an example of one task and the related competencies from a business education project.

Task: Design sessions on accounting principles for small business entrepreneurs.

Competencies (what the Volunteer must be able to do):

- Compare standard accounting principles with local practices.
- Design a lesson plan using 4MAT.
- Use technical vocabulary.
- Include methods that will increase class participation, taking gender roles into account.
- Include assessment techniques to monitor and evaluate learning.

Training Design and Implementation

Competencies drive the content for training that begins before trainees arrive in-country and spans each Volunteer's two years of service. Programming and training staff determine which competencies are addressed in the different training events at post: PST, In-service Training (IST), mid-service training (MSC), and close of service (COS).

A list of training events is included in Appendix 7: The Peace Corps Continuum of Training Events and in Appendix 8: Training Continuum. Also see Appendix 9: Types of Peace Corps Training.

During the design phase of PST the training staff bring together programming and other Peace Corps staff, Volunteers, and project partners to develop training goals, competencies, and a calendar of sessions and activities. In preparation for PST, the team answers questions such as the following:

- What KSAs do trainees already have and how can we best utilize and build on them?
- Based on the competencies that trainees need and the skills they have, what is the content that we need to include?
- What methodologies should we use to optimize these learning opportunities?
- What kinds of sessions and activities will most efficiently and effectively support the trainees as they learn?
- Who will be responsible for covering specific competencies in sessions and activities?
- How are we going to know that trainees are ready for the first three to six months of service?

As staff members design training events that follow PST, they answer additional questions, such as:

- How well are Volunteers performing in their jobs?
- How effectively are they integrating into their communities?
- What additional KSAs do they need?
- How best can these needs be addressed?
- How can we involve project partners so that they are able to work more effectively with Volunteers?

For a list of content areas for training events that follow PST, see Appendix 11: Content for Training Events. Also see Appendix 12: Tips for Designing In-Service Trainings and Mid-service Conferences.

Sharing Information

The staff review many documents in preparation for designing training events. Programming staff share the following documents with the training team:

- Volunteer Assignment Description (VAD)
- Welcome book
- Description of Service (DOS)
- Project plan
- Task analysis
- Quarterly reports

Guide for Discussions

In Peace Corps/Panama, the training team asks the programming staff to complete a form that provides information on the project, technical parts of PST, site information, language needs, IST needs, and resources. This information is used to generate discussions among training and programming, medical, and administrative staff. These discussions form the basis of the training design. For an example of the form refer to Appendix 10: Description of Work Format.

PST Preparation Meetings

In Peace Corps/Bolivia programming staff meet with the training staff to discuss what Volunteers need to know during their first three or four months at site. They stress the importance of language learning and community entry skills. This prepares Volunteers to observe and become a part of their communities before they concentrate on the technical aspects of their assignments. Later in the Volunteers' service ISTs provide opportunities to focus on technical skills.

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Preparation for PST

In Peace Corps/Cameroon, the training officer holds a meeting with training staff, the APCD, Volunteers, Counterparts, and supervisors. This meeting takes place well in advance of PST. They review the project plan and recommendations from the previous PST and IST. In small groups they list the activities, roles, and responsibilities of Volunteers as well as the skills needed to be sworn in as a Volunteer. In the large group they develop a job description and list of technical competencies.

- Volunteer technical newsletters
- Site visit reports
- Project Status report
- Feedback on training events
- Information on the trainees

Site Visits

In addition to reading materials, training staff obtain information through interviews with programming staff, Volunteers, and project partners. Training staff make site visits to interview Volunteers and project partners in the field. While the project plan, task analysis, VAD, Welcome Book, and various reports give trainers a basic understanding of what Volunteers do, site visits enable the training team to design and facilitate sessions with a greater depth of understanding. Conversations and observations provide examples for case studies and information to use in response to trainees' questions.

An Example of What Training Staff Learn From Site Visits

Imagine that training staff are preparing for a PST for health Volunteers. They have read the project plan and other materials. They then go on a site visit and sit down with Volunteer Jake over a cup of tea. Jake tells them the following story:

As you know, I am assigned to a local health clinic in the village. My job is to help the medical staff promote good nutrition, especially among pregnant women. You wouldn't believe how high the rate of anemia is around here! Last month my supervisor and I did an assessment of the current health education activities. We decided that I should conduct mini-lectures and demonstrations at the clinic in the mornings while the women wait to see the doctor. So now I have a little room right across the hall from the waiting area. I've had it for three weeks. I've put up signs and I've even gone out into the hall to invite the women in. But, you know, not one woman has come into the room, and they're all sitting right across the hall from me! Don't they realize that I'm here to help them?

What information does this story provide that training staff probably would not glean from reading documents? What does this story say about the need for integrating community entry skills and knowledge of cultural mores with technical skills? What does it say about the importance of attitudes and attributes such as patience, perseverance, and flexibility? This story is an example of why it is important for training staff to get into the field, talk to Volunteers and Counterparts, and then use the information they get in the design and facilitation of training.

Programming staff encourage training staff to participate in site visits by inviting them to join them on scheduled trips. They also facilitate site visits for trainers by contacting and scheduling meetings with appropriate people. For full-time training staff these visits happen throughout the year. For part-time staff these visits generally happen in the weeks before PST.

Sessions and Activities

Programming and training staff come together to develop the training curriculum. They also involve medical and administrative staff as well as Volunteers and project partners. Staff use the competencies to develop sessions and activities. Sessions refer to formal learning opportunities. Activities refer to experiences in which those being trained seek information or practice skills and apply what they have learned.

Staff determine how the KSAs will be incorporated into the training content. For example, members of the training team might determine that they will include some cross-cultural competencies in language sessions and other competencies in technical sessions. Or they might decide that they will include information on safety to and from work in technical sessions and safety vocabulary and expressions in language sessions.

It is critical for staff to identify

- where each competency will be addressed and who is responsible for that session or activity;
- how sessions and activities will be sequenced so that they build on one another; and
- how the trainee assessment process will work so that staff can determine what KSAs each trainee has and needs by the end of training.

As trainers from each component lay out their suggested competencies, some natural connections occur. Others are negotiated as trainers agree to shift some of their competencies from one week to another. Some posts use themes to integrate the various components and develop sessions that build on one another.

After identifying the sessions and activities, the training team develops the detailed calendar of training events (COTE). Together, programming staff and training staff determine when to schedule visits to Volunteer sites, visits to trainees' assignment sites, the supervisor or counterpart conference, and community projects. The calendar also includes both weekly and daily blocks of time and session titles.

Planning the content of PST, or any training event, takes time. In addition to the weeks before PST, staff meets weekly during PST to share progress and make changes to the plan. PST staff maintains continual communication with other groups as well, and periodically updates Peace Corps staff on progress, changes in the calendar, and any issues. PST staff meets with the trainees to hear how training is meeting their needs and how it could be improved. PST staff also checks in with host families and community members to ensure that there is a mutual benefit to their partnerships with the Peace Corps. Each of these activities helps the training team monitor and make appropriate changes to the calendar of training events.

Programming staff play a critical role during training. In PST, for example, they present information on the project plan as well as the life and role of Volunteers in the field. They arrange for Volunteer and sector specialist panels and presentations. Programming staff also spend formal and informal time with trainees in order to get to know them. This enables staff to make better decisions during the site assignment process. It also helps them identify additional support that trainees might need after training.

For an example of a general COTE that maps out critical events over an entire PST, see Appendix 13: General Calendar of Training Events for PST. For a PST sample timeline, see Appendix 14: Timeline for PST Preparation.

PST Staff Visit Volunteer Sites

In Peace Corps/Thailand trainers spend 3 to 4 days at a Volunteer's site to learn about the challenges, coping strategies, and rewards of being a Volunteer. They stay at the Volunteer's house, meet with community officials, learn about the sector, and observe the Volunteer's project work as well as involvement in secondary activities.

In Peace Corps/Kyrgyz Republic language/cross-culture facilitators (LCFs) participate in ISTs and visit Volunteers at their sites in order to develop SED-specific materials. Volunteers work with the LCFs to incorporate SED vocabulary into the language curriculum.

Staff Selection, Orientation, and Development

Often posts hire additional training staff for PST. Programmers support the staffing process by helping to identify and select candidates. Programmers may know of individuals, possibly Volunteer counterparts, who would be appropriate technical or language trainers. Or they may be able to access trainers through the ministry or agencies where Volunteers are placed. Programmers can also help in the interview and selection process for technical trainers, since they understand what needs to be included in technical training. Likewise, trainers can support programmers when they select programming assistants. This is especially important when programming assistants play a significant role in technical training.

Staff development is an ongoing process. Staff work together to provide information and training so that all full-time and part-time staff have the knowledge, skills, and attitudes to work with trainees and Volunteers. In some posts technical training is carried out by technical trainers who are hired for PST. In others, APCDs or program managers and program assistants conduct technical training. In preparation for this, training staff help programming staff with their session design, presentation, and facilitation skills. When programming staff are responsible for other training (ISTs, mid-service, and/or close of service) and other workshops and conferences, training staff again support programming staff in improving their skills.

In preparation for PST, programming staff help orient the PST team to project goals and objectives, as well as Volunteer tasks and competencies. Programming staff facilitate site visits for training staff to increase their understanding of Volunteer life and work. Some posts use a four-tiered strategy to bring different players into the planning and staff development process for PST.

Tier 1: PST Planning

Tier 2: Coordinators Workshop

Tier 3: Training of Trainers Workshop

Tier 4: Site Preparation

For a description of the four tiers, see Appendix 15: Four-Tiered Preparation for PST.

For a list of topics covered in the Training of Trainers Workshop see Appendix 16: Staff Preparation for PST.

Throughout staff orientation and development, programming and training staff emphasize the importance of personal health and safety and security for trainees and Volunteers as well as for staff. Programming and training staff brief other staff on the concepts that trainees have learned during staging. They also review and discuss the Emergency Action Plan (EAP) for trainees and Volunteers.

In preparation for other training events, programming and training staff work together to ensure that trainers are skilled in topics such as:

- using surveys and focus groups to identify training needs,
- using Volunteers in the planning and management of training,

Staff Development

Staff development for PST trainers can take place over a period of time and may vary for different types of trainers. As you plan staff development sessions, identify who needs to know what and when. Some posts, for example, provide language cross-cultural facilitators (LCFs) with training in competencies and session design before PST starts. Then they offer mini-workshops in facilitation skills throughout PST. These mini-workshops are based on observations that staff make and feedback from trainees during training.

- applying adult learning principles,
- writing learning objectives,
- using processing skills,
- coaching and counseling trainees and Volunteers,
- working with communities to support training, and
- monitoring and evaluating training.

Training Site Identification and Community Development

In programming the word "community" refers to the site where Volunteers complete their service. It also refers to the people who become host families, colleagues, and friends of Volunteers. Likewise, in training, "community" refers to the site(s) as well as the people who are involved with the trainees and training staff. This includes host families, medical personnel at local facilities, officials, townspeople, and so forth.

During PST many posts find that taking training into the community is often more effective than bringing the community into the classroom. Since the primary goal of Pre-service Training is to prepare trainees to become productive and self-sufficient Volunteers in their communities, the more practical, realistic, and experiential the training activities are, the more useful the learning is. As programming and training staff review the competencies and training content, they identify ways in which they can involve the community. Involving communities

- exposes trainees to real-life situations;
- increases trainees' technical skills through formal sessions, practicums, and small projects;
- exposes trainees to cultural norms and behaviors through social contacts;
- increases trainees' language skills through daily interactions;
- increases trainees' workplace and community entry skills;
- develops trainees' awareness of community members as resources;
- helps trainees maintain better health and personal safety; and
- provides language or cross-cultural and technical trainers.

Posts bring trainees and communities together in a number of activities, including

- host family stays
- community projects
- internships
- community mentoring and "shadowing" and
- site visits to the trainee's site.
- community projects
- practicums
- site visits to Volunteers

Programming staff often help training staff develop appropriate training site and host family selection criteria. Programming staff may travel to training sites to ensure that there are adequate opportunities for community activities. They may also request that training staff identify host families in which one member is involved in the same technical field as the trainee.

Involving communities also provides training staff with resources, including

- technical or language trainers;
- support staff, such as administrative assistants, cooks, and drivers;
- training offices and rooms for sessions and events;
- housing for trainees; and
- housing for training staff.

Technical Training in Communities

In Peace Corps/Dominican Republic trainees spend half of their PST in community-based training (CBT). Programming staff work with training staff to identify training sites where trainees will be able to participate in appropriate community activities and also be able to learn from current Volunteers.

Counterpart Orientation

Peace Corps/Dominican Republic holds a counterpart orientation before trainees go on their site visit. The night before the full-day session the counterparts arrive to meet and have dinner with the trainees. The next day the counterparts receive an orientation to the Peace Corps and discuss their roles and responsibilities while the trainees discuss what they plan to accomplish during their four-day site visit. In the afternoon the trainees and counterparts meet to discuss expectations and develop work plans. The next morning the trainees and their counterparts have breakfast together before traveling to their sites.

Programming staff are often in a position to help training staff identify the above resources by facilitating connections with community members. These resources might include

- government officials (mayor, superintendent, and chief, as well as informal town leaders);
- security officials (police chief, police officers);
- health officials (hospital superintendent, doctors);
- ministry officials and staff;
- local experts for demonstrations, panels, or mini-lectures;
- mentors and counterparts to work with trainees and staff;
- school officials, teachers, and students for skills practice activities;
- NGOs and other organizations for internships;
- groups such as farmers and extension agents, women, and youth; and
- host families.

The key to community involvement lies in collaboration among the training, programming, medical, and administrative staffs. Together they identify appropriate communities and plan the right kinds of community involvement.

Training and programming staff also work together to develop community members' orientation to the Peace Corps, the project, and their roles and responsibilities during training. They develop modules on personal health and safety and security to ensure that community members understand how to manage routine health precautions and what to do in the event of an emergency. Programming staff may help facilitate the orientation, and they may follow up with community members to assess their involvement in the training process and the extent to which trainees are meeting the required competencies.

As mentioned above, "community" also includes the sites where Volunteers work. As a part of community development for project partners, many PSTs include supervisor and counterpart conferences. Volunteers and their future colleagues come together to learn about their roles and responsibilities and to develop work plans. Programming and training staff work together to schedule this event, plan the content of the workshop, and prepare the trainees for meeting their project partners.

Trainee and Volunteer Assessment

Each pre-service training program has clearly defined qualification criteria for trainee assessment. Programming and training staff develop the qualification criteria, communicate them to trainees, and discuss and document each trainee's progress toward achieving training objectives. The purpose of trainee assessment is to

- Assist trainees in identifying and developing the KSAs that they need for service by providing timely feedback regarding their performance and progress.
- Advise and coach trainees on specific behaviors that may detract from their success as a Volunteer and to support them as they work to improve.
- Provide staff with information that will help them place trainees in appropriate site assignments.
- Help trainees and staff identify what additional knowledge and skill

development trainees will need at site or at subsequent training events.

- Help trainees reassess, on an ongoing basis, their decision to become Peace Corps Volunteers in light of the realities of service in the country.
- Counsel and advise those trainees whom staff believe should not be sworn in and provide the reasons for the decision, the trainee's rights, and an explanation of the process.

The assessment process

- Applies to all trainees.
- Includes criteria and competencies that are based on the project assignment, are realistic, and can be easily monitored.
- Is clearly explained to trainers and trainees.
- Actively involves trainees in self-assessment.
- Involves feedback and suggestions from Peace Corps staff (programming, training, medical).
- Includes input from community partners (host families, counterparts).
- Supports opportunities to modify behavior within a certain time frame.
- Includes staff training prior to PST and staff coaching during PST.
- Includes clear, accurate, and objectively verifiable documentation.
- Requires that files be open to trainees and staff.
- Models professionalism and open communication.
- Rewards positive behavior and attitudes.
- Builds confidence.
- May, after repeated efforts to change the trainee's behavior, lead to de-selection based on non-achievement of criteria.

Staff initially inform trainees of the assessment process in the materials that they send prior to the trainees' arrival in-country. These materials include VADs, the Welcome Book, and other materials that posts develop.

During the first three days of training, training staff inform trainees of the process both verbally and in writing. Information may include the following:

- Qualification criteria (often a document that is signed by each trainee)
- The assessment process: when, who, what, and why
- Grounds for administrative separation
- Training site and country-specific behavioral guidelines
- The consequences of not achieving the criteria or of violating country-specific behavioral guidelines
- The right of appeal in case of administrative separation

Staff agree on the framework for the assessment process. They incorporate multiple opportunities to assess trainees' progress within the training process. These opportunities include self-assessments, tests, trainee journals, formal and informal observations in classroom and community settings, and interviews with community partners and host families. Training and programming staff use a series of progress reviews that involve the trainee. In many posts the country director also conducts one or two interviews with each trainee during PST.

Prior to each interview, training and programming staff review each trainee's self-assessment and the progress and/or issues noted by staff. The

Country Director Involvement

In some posts the country director introduces the trainee assessment process to emphasize the importance of it and to stress that it should be taken seriously. The country director also states that it is designed to be participatory, supportive, and positive.

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progress report to the trainee integrates staff feedback on the trainee's achievement in all areas of training and includes suggestions for improving knowledge, skills, and attitudes. Posts often ask trainees to keep a notebook or journal of their progress during PST. This helps both staff and trainees monitor and evaluate each trainee's growth.

Trainee Interviews

Programming and training staff hold one-on-one interviews with trainees during the first week of PST and with Volunteers during other training events. Staff use the information to support trainees and Volunteers through their learning process and cultural adjustment. These meetings offer opportunities to find out things such as

- Learning styles
- Professional background
- Strengths and skill needs
- Concerns
- Learning goals
- Preferences for host families
- Preferences for site assignment
- Adjustment at site
- Needs for resources or other support

As programming and training staff design the assessment process they consider whether trainees will be interviewed by the same staff member throughout PST or by different staff members.

For a list of roles and responsibilities in the trainee assessment process see Appendix 17: Trainee Assessment Roles and Responsibilities.

Definition of Terms

Assessment: The process of determining quality, what you do, how you do it, and the results of the process.

Monitoring: Intermittent checks on how things are going.

Evaluation: Activities to determine if objectives were met and what difference training made.

Indicators: Examples of change that provide a way to determine the effectiveness of the process and the impact of training.

Training Assessment

Because training supports programming, programming staff take an active role in the assessment of all training events, including the training events that they manage: IST, mid-service conference, close of service, etc.

The purpose of training assessment is to improve the quality and relevance of training so that trainees and Volunteers have the best possible preparation and ongoing support for their assignments.

A variety of people are involved in the assessment of training:

- During training trainees conduct assessments that indicate how well they think training is meeting their needs.
- After training Volunteers give feedback through surveys, one-on-one meetings, reports, and group meetings. They discuss how well training prepared them for their life and work as Volunteers.
- Training and programming staff observe trainees during training and after training to assess how well training has prepared them for their assignments.
- Programming and training staff also consult with each Volunteer's supervisor to determine how effectively the Volunteer is meeting the job requirements.
- Training and programming staff ask host families, supervisors, and

community partners how well their trainees and Volunteers are integrating into the community and using culturally sensitive behaviors.

- A training advisory group helps staff conduct interviews, review findings, and make recommendations.
- Peace Corps headquarters staff or staff from a nearby post help in an assessment exercise.

The ultimate purpose of assessment is to collect data that will provide people with information that they can use to make informed decisions. The following is a list of people who are recipients of training information and the ways that they use it.

Who needs to know?	Why?
Training staff (present and future)	To improve training in progress To improve future trainings To develop follow-up training events To revise competencies To revise training methods To train and coach trainers
Programming staff	To revise project plans To identify changes needed in Volunteer requests To revise task analyses To provide coaching to Volunteers To improve technical training sessions To plan the next training event(s)
Administrative staff	To develop appropriate budgets to support training To maintain or improve systems
Medical staff	To improve sessions To provide field support during and after training
Country Director	To provide resources, systems, or ideas to improve training
Trainees and Volunteers	To identify KSAs they need To understand what Peace Corps staff are doing as a result of feedback
Peace Corps/Washington	To identify sectoral and global trends To identify and share practices To communicate accomplishments and lessons learned To identify and provide resources to

Review to Improve

After every training event, staff in Peace Corps/Turkmenistan hold a "Review to Improve" meeting to discuss the various aspects of the training. They use this information as they prepare for future events.

	support the field To understand recruiting needs To design or modify materials sent to nominees, invitees, or trainees
Ministries, community organizations, and agencies	To support training with resources (facilities, staff, experts, etc.) To utilize Volunteer KSAs To understand and appreciate the Peace Corps as a development organization
Other posts with similar programs	To learn from other posts To share experiences

Planning and Budgeting Processes

Assessing programming and training provides staff with information that they use in the Peace Corps' agency-wide planning and budgeting process.

The Project Status Report (PSR) and Training Status Report (TSR) provide opportunities for programming and training staff to communicate to headquarters their plans and resource needs for the next fiscal year. Each report includes strengths and challenges as well as lessons learned. The reports indicate how the post is meeting or plans to meet challenges. The information that the post submits is used by headquarters to identify resources needed in the field. The Center also summarizes the information and shares trends and promising practices with headquarters and the field. Both the PSR and the TSR reflect feedback and input from programming and training staff, trainees and Volunteers, and project and training partners.

Posts send PSRs and TSRs to headquarters by November 1 of each year. In preparation for writing the reports it is very helpful for programming and training staff to participate together in review and planning sessions. By sharing information and ideas, programming and training staff are better able to address issues and make decisions. The PSR/TSR process also helps posts work through the budgeting process that begins in late February and March.

For ideas on how to guide discussions on training during these planning sessions, see Appendix 18: Questions to Guide Action Planning for Training and Appendix 19: Questions to Guide Resource Planning for Training.

Posts communicate to headquarters their plans, resource needs, and changes to their plans through the Integrated Planning and Budget System (IPBS). This process occurs several times throughout the fiscal year.

While most of the IPBS documents are prepared by administrative officers, they represent input from all staff at post, Volunteers, and community partners. Programming and training managers need to develop their plans and identify their requests so that they can discuss them and get input and buy-in from the rest of the staff at post.

IPBS submissions are made at the following times of the year:

April: Strategic Plan and Budget Process—The post submits its strategic plan and general budget needs. Programming and training staff identify

numbers and kinds of training events, staffing, and needs for materials and equipment. They also identify any support they want from the Center for Field Assistance and Applied Research and submit any requests for United States Personal Services Contractors (USPSCs).

July: Operating Plan and Budget Process—The post submits a detailed budget for the upcoming year. This reflects feedback from headquarters on the April submission. Programming and training staff complete detailed Center Activity Request forms for each activity that they want the Center to fund.

February and June: Periodic Budget Reviews (PBRs) Post submits changes to the budget forecasts twice during the year. Programming and training staff submit new requests to the Center, or modify or cancel previous requests. They also address any changes in their needs for resources.

For questions to guide programming and training staff through the IPBS process see Appendix 20: Programming and Training Budget Cycle Questions.

For more information on the IPBS process see *Booklet 5: How to Implement a Project* (ICE No. T0117).

Requesting Volunteers

As mentioned earlier in this booklet, programming reflects the applicant pool plus the training that the Peace Corps provides. As programming staff request Volunteers from headquarters, they consider the knowledge and skills that Volunteers must have and cannot be taught as well as the knowledge and skills that can be learned in-country. This is done in collaboration with training staff. Some programming staff find that when one assignment area is difficult to recruit for, they can request Volunteers in different assignment areas and can modify training to bring these Volunteers up to the skill level needed by the project. Programming staff work closely with headquarters so that each group understands and appreciates the other group's roles and challenges. Programming staff provide information about their projects so that Volunteer Recruitment and Selection staff can recruit more effectively and make better matches between trainees and posts.

Challenges of Integrating Programming and Training

The preceding pages in this booklet outline the necessity for and the advantages of integrating programming and training. Despite the advantages of collaboration, some staff members may resist integration for any number of reasons. For example:

- Staff may feel that it requires more time to coordinate with other staff.
- Staff may find it difficult to approach other staff and ask for information.
- Collaboration may require that staff give up or change roles that they have had in the past.
- Staff may feel uncomfortable about other staff observing their work and potentially voicing criticism about areas that are their responsibility.

Modifying Recruitment

In the past Peace Corps/Turkmenistan requested Volunteers with a master's in public health. Because it was hard to recruit people with skills in this area and because there was a high early termination (ET) rate among these Volunteers, the post modified the health project. The post then requested a different assignment area that included individuals with some experience in health-related topics. The result was a higher fill rate and increased Volunteer satisfaction.

On-going Integration Discussions

Staff in Peace Corps/ Dominican Republic often discuss one aspect of programming and training integration during each staff meeting. By addressing one at a time they are able to keep the task manageable and also see results on an ongoing basis.

- Staff may find it overwhelming to begin an undefined process.
- Staff may not have the experience or skills in areas that integration requires (e.g., programming staff may not have skills in training).
- Staff may be comfortable with the status quo and not convinced that a new way will be better.
- Some aspects of integration may have budgetary implications (e.g., additional site visits by staff).

Each post's situation is different. Staff have different priorities, different skills, different experience, different personalities and work styles, and different opportunities and challenges. However, there are actions that staff can take to facilitate communication and improve their teamwork. They can:

- Bring a group of staff members together to discuss the points of integration and the benefits of integration both to staff and ultimately to trainees and Volunteers.
- Choose one or two critical integration points and work on those first.
- Identify champions of the "vision" who can encourage other staff when time is short, problems arise, and stress is high.
- Offer training opportunities so that staff can develop the KSAs that they need.
- Talk to colleagues at other posts who have successfully integrated programming and training. Talk to colleagues at Peace Corps headquarters.
- Be honest and acknowledge that participatory processes are complex and often seem slow.
- Develop plans and timelines for points where programming and training integrate and be clear on who is responsible for what and when.
- Demonstrate how working together builds skills as staff learn to take on new roles.
- Acknowledge times when the team makes decisions, solves problems, and agrees to compromises.
- Build on existing foundations, aspects of integration that are strong, and small successes.
- Continually monitor so that the course can be corrected quickly.
- Incorporate feedback along the way.
- Learn from mistakes.
- Reward risk takers and innovators.
- And finally, communicate, congratulate, and celebrate.

Appendix 21: Post Programming and Training Readiness Survey offers a tool to assess where a post is in the process of bringing programming and training staff together as a team.

The more that staff understand the dynamics of teamwork, the better they are able to come together and support one another. The following three appendixes offer additional ideas on teamwork:

Appendix 22: Characteristics of an Effective Team

Appendix 23: Phases of Group Development

Appendix 24: Diversity in the Peace Corps

Appendices

Appendix 1

Acronyms

AA	Assignment area
AF	Africa region
AID	Agency for International Development
AO	Administrative officer
AOT	Administrative officers training
APCD	Associate Peace Corps director
APCMO	Area Peace Corps medical officer
AVC	All-Volunteer conference
BIT	Budget Implementation Team
CBT	Community-Based Training or Computer-Based Training
CD	Country director or community development
CDA	Country desk assistant
CDO	Country desk officer
CDU	Country Desk Unit
COS	Close (or continuation) of service
COTE	Calendar of training events
DOS	Department of State or description of service
DOW	Description of work
EAP	Emergency Action Plan
EMA	Europe, Mediterranean, and Asia region
ET	Early termination
FAD	Field Assistance Division
FSN	Foreign Service National
HCA	Host country agency
HCN	Host country national
HQ	Headquarters
IAP	Inter-America and the Pacific region
ICE	Information Collection and Exchange
IP	Individual placement
IPBS	Integrated Planning and Budget System
IST	In-service training
LCF	Language/cross-culture facilitator
M&E	Monitoring and evaluation
MED SEP	Medical separation
MOA/U	Memorandum of agreement/understanding
MOU	Memorandum of understanding
MS	Manual section or Medical Services
MSC	Mid-service conference
NGO	Nongovernmental organization
OST	Overseas staff training
P&T	Programming and training
PBR	Periodic budget review
PC/W	Peace Corps/Washington

PCMO	Peace Corps medical officer
PCMS	Peace Corps Manual section
PCT	Peace Corps trainee
PCV	Peace Corps Volunteer
PCVC	Peace Corps Volunteer coordinator
PCVL	Peace Corps Volunteer leader
PDM	Project design and management
PLU	Program Learning Unit
PO	Personnel officer or programming officer
PSR	Project status report
PST	Pre-service training
PTA	Programming and training advisor
PTLO	Programming and training liaison officer
PTO	Programming and training officer
PTQ	Pre-training questionnaire
PVO	Private volunteer organization
QBR	Quarterly budget review
QTRS	Quarterly Trainee Request System
RAU	Regional Assistance Unit
RD	Regional director
RDD	Resource Development Division
RPCV	Returned Peace Corps Volunteer
RSO	Regional security officer
SAV	Special assignment Volunteer
SBD	Small business development
SED	Small enterprise development
SPA	Small Project Assistance
SRPTC	Sub-regional programming and training coordinator
STAU	Short Term Assistance Unit
TA	Task analysis, technical assistance, or travel authorization
TCN	Third country national
TCT	Third country training
TI	Trainee input
TO	Training officer or travel orders
TOT	Training of trainers
TR	Trainee requests
TSDU	Training and Staff Development Unit
TSR	Training status report
USPSC	U.S. personal service contractor
VAD	Volunteer assignment description
VRS	Volunteer Recruitment and Selection
VS	Volunteer Support
WHO	World Health Organization
WID	Women in Development

Appendix 2

Glossary

Assignment area	Description of the training, qualifications, and experience required for a specific Volunteer assignment. Also indicates a generic job title and code number for a Volunteer assignment.
Baseline data	Data that describe the situation to be addressed by a project and serve as the starting point for measuring the performance of that project.
Benchmarks	Activities or decision points that are critical to the achievement of objectives. Benchmarks should have time frames to help track progress toward meeting objectives.
Close of Service Conference	A planned event that marks the end of a Volunteer's service. Activities are planned to assist Volunteers in making the transition back to the United States and to receive Volunteer feedback on their assignments.
Community members	The individuals who are the ultimate target of a project intervention and for whom the project is working to improve upon a basic life condition, i.e., food, shelter, health, employment, education, income, quality of life indicators, etc.
Community partners	The individuals with whom Volunteers work in community settings, sometimes referred to as counterparts or service providers.
Competency	A particular skill, knowledge, attitude, or behavior required to perform a given task.
Country Agreement	A legally binding document developed by the Peace Corps and the hostcountry governmental body responsible for overseeing Peace Corps activities. This document specifies Peace Corps program goals and activities.
Description of work	A document that defines the goals of training and provides the following: general guidelines for trainer responsibilities, expected trainee competencies, number of instruction hours, course content, host country officials to be used as resources for training, and country-specific requirements particular to the training.
Development cooperation agencies	Organizations involved in development efforts in the host country. These include large NGOs (CARE), bilateral organizations (USAID from the U.S. or DANIDA from Denmark), and multilateral organizations (UNICEF). These may or may not be stakeholders that have some involvement in a Peace Corps project. However, it is helpful to be aware of the activities of these agencies to better understand the development context in the host country and the most appropriate role for the Peace Corps.
Evaluation	Part of an assessment, done at a particular point in time, such as in the middle or at the end of a project. It usually answers the questions: Did we do what we said we were going to do? and What are the results of our efforts?
Focus group	A data collection technique in which selected participants are guided in a discussion on a specific topic.
Host country agency partners	Host country government ministries and/or local nongovernmental agencies (NGOs) that are co-designing, implementing, and assessing a project with the Peace Corps. There may be one or more agency partners involved in a project in some role.
Indicator	A marker or characteristic that represents the achievement of an objective. Indicators need to be relevant to the situation, specific, measurable, and feasible.
In-Service Training	Training activities that take place in the Volunteer's assigned country during the period of service and meet a Volunteer's ongoing training needs: technical, linguistic, cross-cultural, personal health, and personal safety and security.

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Integrated Planning and Budget System (IPBS)	An annual process that describes a Peace Corps post's program strategies and goals, including proposed new projects, a description of the year's programming and training events, and the budget for the country program.
Interview	A data-gathering technique in which a set of questions (structured or unstructured) is asked of an individual or a group of individuals.
Learning objective	Learning objectives describe what the trainee will be able to do as a result of training. Most learning objectives are made up of three parts: Performance, the measurable or observable knowledge, attitude, skill, or behavior the trainee learns; The condition under which the learned knowledge, attitude, skill, or behavior is observed; and The standard of performance, or how well the trainee demonstrates the new knowledge, attitude, skill, or behavior.
Memorandum of Understanding (MOU)	When referring to programming, an MOU is a document that defines the terms of agreement between the Peace Corps and a host country agency regarding a collaborative project. The MOU, also called "project agreement," contains or refers to the project plan and defines the responsibilities of the Volunteers, Peace Corps staff, and the host country agency.
Monitoring	Part of an ongoing assessment that answers the question "How are we doing?" It provides information on the day-to-day functioning of the project.
Observation	A systematic data collection technique for watching people or events and recording what is seen.
Outcomes	The changes in project participants resulting from project activities. Outcomes may relate to changes in knowledge, skills, attitudes, values, behavior, conditions, or status.
Participatory evaluation	Participatory evaluation involves project stakeholders in the different phases of an evaluation effort, including planning and design, collecting and analyzing the data, and disseminating and using the results.
Program	Refers to all Volunteer activities within one country. For example, the entire Peace Corps operation in Ecuador is referred to as the Peace Corps program in Ecuador.
Project	All Volunteer activities related to a common purpose. The purpose is achieved by implementing a set of goals and objectives. For example, under the health sector in Mali, there are two projects—a water and sanitation project and a maternal and child health project.
Project Agreement	A document , although not legally binding, serves as a contract between the Peace Corps and host-country agency, clearly defining the purpose, goals, objectives and details of a project, as well as the responsibilities of each party. Also known as Memo of Understanding (MOU) in some countries.
Project criteria	Peace Corps priorities reflecting philosophy, needs, and resource availability that should be incorporated into each project. While each criterion need not be met in every project, each must be addressed.
Project goal	A project goal statement should answer the question "What condition needs to occur to achieve the project's purpose?"

Project objective	Project objectives describe what activities will take place and the desired change that will occur because of those activities. Project objectives answer two questions: What major activities will Volunteers and their community partners do? What knowledge, skills, attitudes, or behaviors are expected to change because of these activities? Project objectives should be measurable and time bound.
Project participants	All of those involved, in one way or another, in the promotion, design, organization, implementation, evaluation, and/or documentation of a project, to include community members, host country agency partners, community partners, co-workers, and supervisors.
Project plan	The written agreement between the Peace Corps and a host country agency that serves as a working document, defining why and how they will proceed with a project strategy and Volunteer assignments. It is compatible with Peace Corps programming criteria, host country priorities, and community needs and resources, and consists of the project background, project description including the project framework (project purpose, goals, and objectives), monitoring and evaluation plan, and project management. The project plan is often incorporated into a project agreement or memorandum of understanding that is jointly signed.
Project purpose	A project purpose statement that answers the question "What is the broad desired improvement in people's lives that will result from this project?" The statement should be brief and visionary and explain why the project is being implemented.
Qualitative data	Pieces of information in the form of words, usually quotes, and a description that answers questions about "why" and "how."
Quantitative data	Pieces of information in the form of numbers that answers questions about "what" and "how many."
Quarterly Trainee Request System	A process by which posts, four times a year, project the numbers and types of Volunteers needed for country projects.
Questionnaire	A written document consisting of questions that individuals are asked to complete, either by themselves or with the data collector.
Sector	Refers to all activities related within one content area. Peace Corps activities are usually classified according to the following sectors: agriculture, business development, education, environment, health, and youth development.
Stakeholder	Individuals or groups of individuals who either affect or are affected by a project. In a Peace Corps project, this typically includes Volunteers, community partners, community members, supervisors, host country agency partners, programming and other post staff, and Peace Corps headquarters staff.
Statement of Work (SOW)	Part of the contractual document that outlines the responsibilities of a person performing a Personal Services Contract (PSC) or an organization performing under a non-Personal Services Contract. The SOW is included in the Request for Proposal (RFP) provided to contractors who wish to bid for a training program or other Peace Corps contract.
Supervisor	A person within a government agency or nongovernmental organization in charge of a particular department or unit to which Volunteers are assigned.
Task analysis	An examination of project objectives to determine the discrete activities that a Volunteer must be trained to perform in order to accomplish the objective.
Task, project	Activities that Volunteers perform to meet the project's goals and objectives.
Training goal	A training goal describes the broad desired results of a training event.

Training of trainers (TOT)	A program to prepare training staff for their duties. The TOT is attended by the training manager, coordinators, language instructors and other instructors, and support staff as determined by the training manager.
Volunteer assignment	A set of responsibilities to be undertaken by one or more Volunteers working on a project. For example, the health project in Ecuador has two Volunteer assignments: (1) an assignment that includes activities requiring the skill of a person with a degree in health, and (2) an assignment that includes activities requiring the skills of a person who has a background and an expressed interest in community extension work in health.
Volunteer Assignment Description (VAD)	The document outlining the responsibilities, activities, work objectives, cross-cultural expectations, living conditions, entry skills, and other competencies required for a given Peace Corps Volunteer assignment. It is used by placement officers to select and place future Volunteers, and to inform those invited to become Volunteers about the assignment they are being offered.

Appendix 3

Programming and Training Integration Checklist

The following list of practices describes ways in which programming staff play a critical role in training and training staff play a critical role in programming. As you read the list below, indicate how often these practices occur at your post. Then mark an asterisk (*) next to those practices that you want to put in place or improve.

Practices	Never	Sometimes	Always
A. Project Plan Design, Review, and Revision			
1. Programming staff design, review, or revise project plans to reflect host country priorities, community needs, the kinds of Volunteers who are available, and to what extent Volunteers can be trained to meet the goals and objectives of the project.			
2. Training staff discuss with programming staff what KSAs can and cannot be learned during PST and other training events.			
3. Programming staff use this information to guide project design and revision.			
4. Programming staff create a project advisory committee (PAC) to guide the development, review, or revision of the project. Training is represented in the PAC.			
B. Task Analysis and Competencies			
1. Programming staff, with assistance from training staff, conduct a task analysis to determine the tasks that Volunteers do to meet the project's goals and objectives. They accomplish this through discussions and site visits with Volunteers and counterparts, through questionnaires, and from Volunteer reports.			
2. Programming staff review the task analysis annually, make revisions if necessary, and inform training staff of any changes.			
3. Programming staff use the task analysis to develop Volunteer Activity Descriptions (VADs).			
4. Programming staff share VADs with training staff.			
5. Programming and training staff use the task analysis to develop competencies. The competencies describe the KSAs related to work, family, community, health, and safety and security that trainees need to know in order to complete their assignments effectively.			
6. Programming staff include the competencies			

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in a description of work (DOW) that guides training staff as they design and implement training.			
7. Programming staff provide the language trainers with a list of technical vocabulary to include in PST and in language clinics.			
C. Training Design			
1. Training and programming staff use the task analysis and competencies to develop training objectives and content for PST and other training events (IST, mid-service, close of service, etc.). They review these annually.			
2. Each year, if necessary, staff review and revise objectives and content for training events.			
3. Training and programming staff review the KSAs of trainees to determine the gap between what they know and can do and what they need before they swear in as Volunteers. They design PST based on the gaps.			
4. Staff determine strengths of trainees and involve them as facilitators in those areas.			
5. Programming staff give input on the design of the calendar of training events (COTE) for PST, including the timing and length of site visits, the supervisor or counterpart conference, technical training practice sessions, and community activities or projects.			
6. Programming staff give input to the PST syllabus, including themes and order of content.			
7. Programming staff work with training staff to identify community activities or projects for PST and appropriate self-directed activities.			
8. Programming staff recommend community members as speakers, trainers, mentors, coaches, and host families.			
9. Programming and training staff conduct needs assessments with Volunteers prior to all training events, through discussions and site visits to Volunteers and counterparts, questionnaires, and quarterly reports. They use the information to design ISTs, etc.			
10. Programming and training staff assess the gap between Volunteer KSAs and community needs to determine what to include in ISTs.			
11. Programming staff develop In-Service, mid-service, and close of service training designs with training staff in response to needs of participants.			

D. Training Site Selection and Development			
1. Programming and training staff develop training site selection criteria.			
2. Programming staff share information with training staff on sites that may be appropriate for training events.			
3. Programming and training staff identify types of community activities or projects for trainees during PST. Programming staff make visits to potential training site(s) to determine if these types of community involvement are possible.			
4. Programming staff give input to training staff on project-related selection criteria for host families. Criteria might include language needs or experience in the project's sector.			
5. Programming and training staff provide orientation, training, and coaching to community members involved in PST and ISTs.			
E. Staff Selection, Training, and Development			
1. Programming and training staff collaborate to develop the criteria for, advertise for, and select technical trainers for PST.			
2. In preparation for PST, programming staff provide training staff with documents that explain the project plan and the life and work of Volunteers. These materials include the VAD, welcome book, project plan, description of work (DOW), brochures, Project Status Report (PSR), quarterly and annual reports, newsletters, etc.			
3. During TOT, programming staff hold sessions for training staff on the project plan and the roles of the Volunteer in development.			
4. Programming staff arrange for training staff to conduct site visits before PST to better understand the life and work of Volunteers. Visits include meetings with agencies, Volunteers, counterparts, community members, host families, etc.			
5. Programming staff arrange for training staff, including part-time staff, to participate in ISTs and workshops to hear Volunteer challenges and successes as well as feedback on training.			
6. Training staff work with programming staff to improve skills in training design and facilitation.			
F. Training Implementation			
1. Programming staff participate in PST as technical trainers or advisors to technical trainers, and as coaches to trainees.			

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2. Programming staff participate in other training events as trainers and facilitators.			
3. Programming staff visit PST regularly to present information on the project, site assignments, roles of the Volunteer in development, project implementation and assessment, etc.			
4. Programming staff include counterparts and community members in appropriate training events as opportunities for capacity building.			
G. Trainee Assessment and Volunteer Development			
1. Programming and training staff assess each trainee's performance throughout PST to determine if each meets the requirements for swearing in. They conduct observations and individual interviews. Staff discuss strategies for additional support (tutoring, mentoring, shadowing, etc.) during PST.			
2. Training staff provide information and materials to programming staff as they develop plans with Volunteers to continue their learning process at site (i.e., with language tutors, coaching, technical advisors, materials, etc.).			
H. Trainee Site Placement			
1. Programming and training staff conduct meetings with trainees throughout PST to determine KSAs and site preferences.			
2. Training staff (as well as medical staff) give input to programming staff during the placement process, including information on trainee strengths and weaknesses and preferences.			
I. Site Visits			
1. Programming and training staff design site visit report formats that elicit from Volunteers and their project partners information on the project, community integration, training, health, and safety and security.			
2. Programming and training staff (as well as administrative and medical staff) make site visits to Volunteers and their project partners. They share information that they glean with the rest of the staff.			
J. Training Assessment			
1. Training and programming staff design training assessment tools based on who needs to know, what they need to know, and when.			

2. After each training event, programming and training staff, along with other staff involved in training, hold a "Review to Improve" session.			
3. Programming and training staff ask trainees and Volunteers for feedback and input on training during and after each training event, through reports, site visits, office visits, training events, and surveys.			
4. Programming and training staff assess Volunteer performance in the field to identify to what extent KSAs presented in PST and IST are being used and whether there are other KSAs that need to be included in future training.			
5. Programming and training staff assess how well training prepared Volunteers for their life and work in their communities through observation, trainee and counterpart feedback.			
K. Volunteer Recruitment			
1. Training staff discuss with programming staff the project-related KSAs that can be developed through formal and informal training.			
2. Programming staff use this information to identify the skills Volunteers need to have before arriving in-country. This drives the assignment areas (AAs) that programming staff request from Volunteer Recruitment and Selection.			
3. Programming staff revise the project plan if it is not possible to get or train Volunteers in the skills required by the project goals and objectives.			
L. Planning and Budgeting Processes: IPBS, Ops, PSR/TSR			
1. Programming and training staff identify strengths and weaknesses in training and include their analysis and plans to address weaknesses in PSR/TSRs.			
2. Programming and training staff identify programming and training priorities to present at the IPBS planning retreat.			
3. Programming and training staff develop an annual calendar of training events. This information guides the budget planning process.			
4. Programming and training staff discuss budgetary needs with the administrative officer.			
5. Programming and training staff identify the need for USPSCs and document this in the IPBS.			
6. Programming and training staff collaborate on Center requests.			

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Appendix 4

Training Informs Programming Scenarios

The following scenarios are examples of how training informs programming. Read each scenario. Then ask staff members what they would do in the scenario and what decisions they would make. Finally, compare their answers with the possible solutions provided.

Scenario 1: Are the right skills being taught?

Through site visits, interviews, and reports staff find that Volunteers are not using the skills that were taught during training.

What might be the reasons?

Possible reasons:

- Trainees did not learn what was taught,
- The skills were not taught effectively,
- The skills cannot be taught in the PST time period, or
- The skills are not the ones needed in the field.

What would you do?

Possible actions:

- Change the approach to training to make it more effective,
- Reteach the skills in IST, or
- Conduct another task analysis to determine what skills are needed and redesign training accordingly.

Scenario 2: Should the post change the Volunteers it requests or the project plan?

Peace Corps headquarters informs the post that it is no longer able to recruit the large number of Volunteers with nursing degrees that the post needs for its health project. Training staff confirm that they cannot teach these high-level skills through in-country training. What would you do?

Possible actions:

- Determine if the goals and objectives of the project can be attained by lower-skilled Volunteers,
- Consider requesting fewer higher-skilled Volunteers and place them in strategic assignments so that they can act as resources for lower-skilled Volunteers, or
- Change the goals and objectives of the project to reflect the lower-skilled Volunteers who can be recruited.

Scenario 3: What programmatic and training changes will increase Volunteer skills?

A post requests French-speaking trainees for a TEFL secondary education project. Staff observe that French-speaking trainees with no teaching experience are not able to develop adequate classroom skills in a 10-week PST. Staff also observe that trainees with an education background can learn basic French in 10 weeks of PST. What would you do?

Possible actions:

- Continue to request French-speaking skills,
- Intensify PST technical training and practice teaching and schedule a technical IST three months after PST,
- Increase the number of site visits during the first year to coach Volunteers,

- Place Volunteers with good technical skills closer to Volunteers with weaker skills to encourage peer teaching and coaching,
- Decrease the number of requests for or stop requesting Volunteers with French-speaking skills,
- Request Volunteers who have a degree in education and/or have successfully worked in classrooms,
- Continue to focus on language skills during PST,
- Require language learning or tutoring during the first six months at site, or
- Conduct regional language clinics after PST.

Now discuss similar scenarios that are relevant to your post.

Appendix 5

Sample Timeline

Task Analysis for _____ / _____
(Assignment Area)

Volunteer Tasks	Timeline/Months																							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Task 1 Conduct a participatory needs assessment of current health education activities targeting women PST ☐ IST ☐ PDM ☐ IST ☐ COS ☐	▬	▬	▬	▬	▬																			
Task 2 Based on the assessment, work with health personnel to determine how the needs of pregnant women can be better met PST ☐ IST ☐ PDM ☐ IST ☐ COS ☐						▬	▬	▬																
Task 3 Assist health personnel in developing a one-year strategic plan for implementing ongoing health education activities for pregnant women PST ☐ IST ☐ PDM ☐ IST ☐ COS ☐									▬	▬	▬													
Task 4 Help health personnel implement the strategic plan (with specific benchmarks) for health education for women PST ☐ IST ☐ PDM ☐ IST ☐ COS ☐												▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬
Task 5 Assess quality and quantity of health education activities targeting pregnant women and adapt strategic plan PST ☐ IST ☐ PDM ☐ IST ☐ COS ☐															▬	▬	▬	▬	▬	▬	▬	▬	▬	▬

Appendix 6

Sample Task-to-Competency Worksheet

Project Community Health Education /

(Assignment Area)

Task: Conduct a needs assessment (NA) that helps a community identify its health needs and strengths.				
Competencies				
Technical/Roles of the Volunteer in Development (RVID)	Language	Cross-Cultural	Personal Health	Safety and Security
Describe or demonstrate the preferred methods of conducting a needs assessment	Using the local language			
List the techniques and materials required for each method of NA		Identify potential implications of each technique		
Work with counterpart to select the most appropriate NA	Demonstrate ability to lead a conversation	Describe the implications of status, hierarchy, gender, and decision-making roles		Identify the factors that need to be considered, including gender, transportation, and street safety
Work with counterpart to prepare the community	Demonstrate ability to use appropriate greetings and deliver a presentation	Describe the protocol for addressing local leaders and different family members Explain the dynamics of group interactions Demonstrate how to invite people to participate in the NA	Describe how to politely decline questionable food or drink	
With Counterpart, conduct the NA		Describe the role of interviewer and interviewees		Describe the preferred transport to and from the interview sites
Compile and prepare data for presentation to the community	Describe how to communicate data to a nonliterate audience	Describe appropriate ways to present the information to the community: the setting, methods, role of local leaders, role of the community members	Describe beverages that are typically present at communal gatherings and which ones to avoid	Describe situations to avoid in large gatherings Identify strategies that help reduce risk factors

Appendix 7

The Peace Corps Continuum of Training Events

Training in the Peace Corps is a continuum of learning opportunities that build on each other. They begin before trainees arrive at post and span the two years of Volunteer service. Programming and training staff determine which competencies will be addressed in the different training events that take place at post. They work with staff at headquarters to integrate information that is provided before and after Volunteer service begins.

A list of the training events is included below in "Training Events" and "Additional Training Opportunities."

Training Events

The following training events are considered standard events by most posts. They begin before trainees arrive at post and continue until a few months before Volunteers close their service.

Staging: This event is held at various locations in the United States and is managed by the Staging Office at headquarters. Staging is a time for invitees to finalize administrative paperwork, become more familiar with the Peace Corps, increase their knowledge and skills in safety and security, and begin to form networks with colleagues. Prior to staging, invitees receive information on what the Peace Corps is doing in the country, training, policies, and the host country. Additional information often includes materials for language learning. Programming and training staffs develop materials that are used during staging, including an overview of the post and training.

Pre-Service Training (PST): This eight-to-12-week training event is held in the country of assignment and is the cornerstone of the Peace Corps' formal training program. The primary purpose of PST is to prepare each Volunteer for the first three to six months of service. It is also a time to introduce concepts and skills that will be built upon during subsequent training events and while Volunteers live and work at their sites. PST focuses on language, technical skills, cross-cultural understanding, community integration, the role of the Volunteer as a development worker, personal health, and safety and security. PST is a time for the Peace Corps to assess each trainee's readiness for service. It is also a time for each trainee to reconfirm that he or she is ready to make the commitment to serve as a Volunteer. Depending on the post, the training model may be center based (most of the training conducted at a central site), community based (trainees living and learning primarily in villages), or a combination of the two (often referred to as mixed). For a comparison of the three types of training, see Appendix 9: Types of Peace Corps Training.

In-Service Training (IST): The purpose of IST is to reinforce the language and technical skills that were presented during PST. It is also an opportunity to learn new information and skills. IST includes content that reflects needs observed during staff field visits. It also reflects input from Volunteers and project partners. IST is generally held three to six months after PST and usually lasts three or four days. At some posts staff bring Volunteers together from the same sector but from different groups. In many cases, the IST is an opportunity for Volunteers and their host country national Counterparts to work together on common projects or topics.

Close of Service Conference (COS): The purpose of the COS conference is to prepare Volunteers for their reentry into American culture, school, and the job market. It is also a time for Volunteers to plan how they will make the transition out of their project and their communities. Some posts invite counterparts for part of the conference so that they can plan with Volunteers how they will support project sustainability after the Volunteers leave. Peace Corps staff use the COS conference to obtain feedback on the project, training,

and issues such as Volunteer support. They also encourage Volunteers to discuss how they can support the Peace Corps' third goal of taking the world back home. The three- or four-day conference is usually held three to four months prior to the end of service.

In addition to the above training opportunities, some posts include other conferences and workshops based on Volunteer needs, new initiatives, and special circumstances that require staff, Volunteers, and counterparts to come together. These training opportunities described below require the same careful needs assessment, planning, and facilitation as the other training events.

Additional Training Opportunities

Pre-Staging: Prior to staging, the Peace Corps promotes learning about development and the country of service by sending materials to invitees and referring them to other resources.

Mid-service Conference: This conference is generally held 12 months after PST. Its purpose is to review the successes and challenges of the Volunteers' service, to share ideas, to review the project and get feedback, and to provide additional skills and support as necessary. The conference usually lasts three or four days.

All-Volunteer Conference: Some posts hold an AVC to strengthen collaboration and idea sharing among Volunteers from different groups and projects. An AVC is also an opportunity to get feedback from Volunteers and to discuss critical issues. Often, all staff at post participate to get feedback and to support teamwork between the office and the Volunteers.

Counterpart Workshop: Most posts hold a supervisor/Counterpart workshop during PST. Its purpose is to provide time for trainees to get to know their colleagues and to plan what they will be doing in their assignment for the first several months. It is also an opportunity for the Peace Corps to review with agency partners project goals and objectives and to clarify roles, responsibilities, policies, and procedures.

Sector Meetings: Programming staff meet with their Volunteers to discuss project-specific topics. Sector meetings might include a review or evaluation of the project plan or upcoming changes in the project. They are often combined with ISTs and mid-service conferences.

Project Design and Management Workshop (PDM): This workshop brings Volunteers and their Counterparts together to learn how to engage communities in identifying, planning, managing, and evaluating projects. (Refer to the *New Project Design and Management Workshop Training Manual,* ICE# T0107.)

Peer Support Workshop: Some posts hold an optional workshop that focuses on listening skills and ways Volunteers can support one another.

Conferences on Peace Corps Initiatives: These events focus on post, regional, or agency-wide initiatives. They might include topics such as HIV/AIDS, Gender and Development (GAD), diversity, information communication technology (ICT), etc.

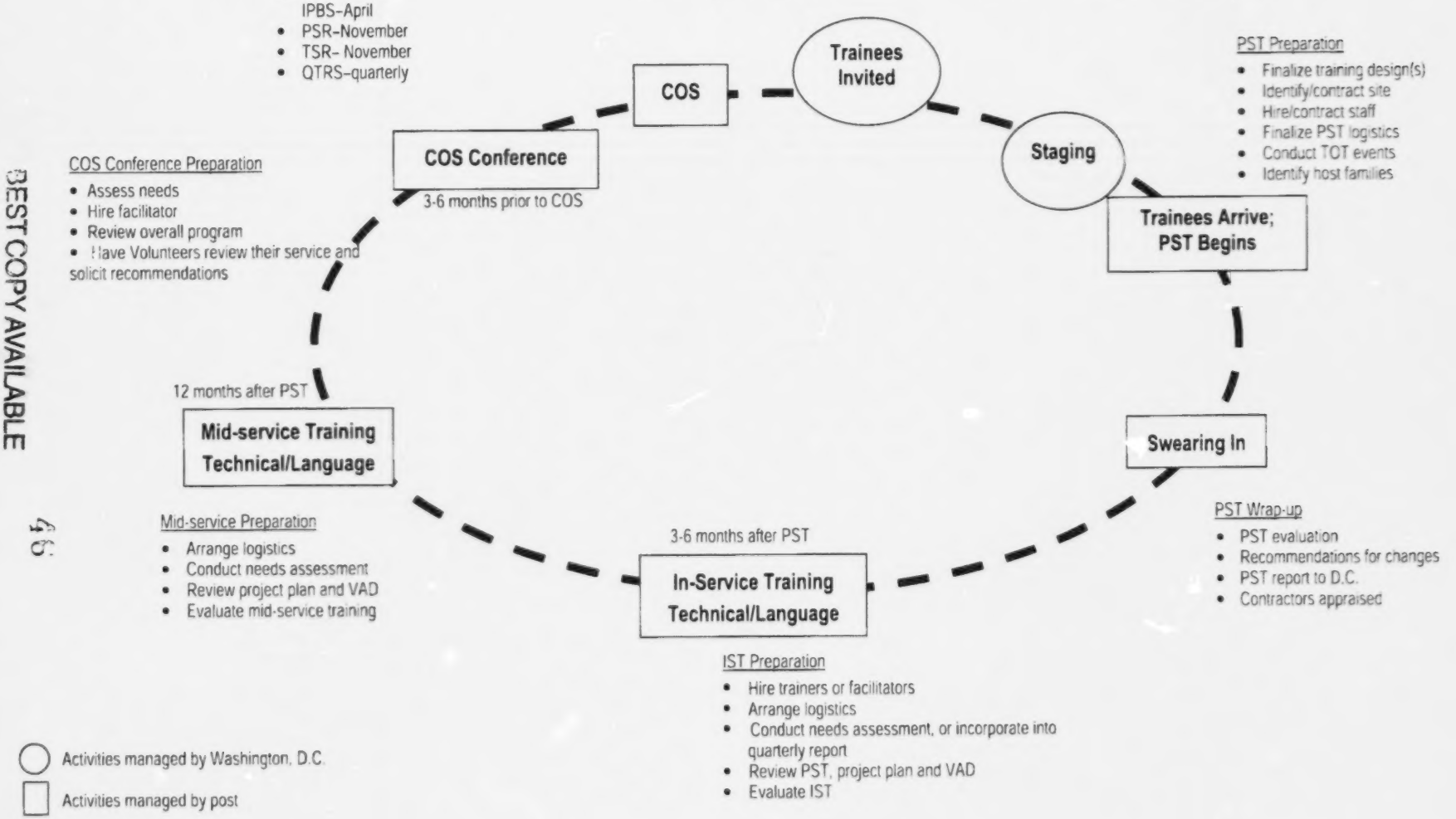
Safety and Security Workshops: While the topic of safety is included in each training event, posts may decide, because of events or incidents in the country, to hold special workshops that focus strictly on safety and security.

Teaching Skills Workshops: Based on need, posts may hold workshops for non-TEFL Volunteers who teach in the classroom (e.g., small business development and environment Volunteers).

Cross-Border Workshops: Some posts find it helpful for Volunteers and staff from different posts to convene to discuss topics that are of mutual interest. Topics might include sharing ideas on summer activities such as camps or developing SBD materials. Other topics might include discussions on safety and/or Emergency Action Plans.

Appendix 8

Training Continuum



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Appendix 9

Types of Peace Corps Training

Center-based Training		Mixed	Community-based Training	
A.	Training activities are centralized around a training facility, and all trainees live at or near site where the training center is located. Trainees may or may not live with families for all or part of their training.	This is center-based training that incorporates field-based or self-directed learning activities.	A.	Training is decentralized, with small groups of trainees (three or four) living and working in multiple communities or neighborhoods. All trainees live with families for the duration of training.
B.	Language teachers are responsible mainly for language training and may provide periodic assistance with other training.	This is essentially a center-based training design, but with an important distinction.	B.	Language or cultural facilitators not only teach formal language classes but serve as cultural and technical "guides" for trainees outside of the classroom.
C.	Most training activities are directed by instructors or trainers, whether in the classroom or in the field. Daily training schedule is determined by training staff.	Project-specific groups of trainees (usually 10 or more) spend a period of time in a community other than the one in which the central training facility is located.	C.	Independent "trainee-directed activities" constitute the bulk of training at the community level. Trainees are responsible for setting their own schedule within a set of parameters.
D.	The majority of (nonlanguage) training is through group sessions at a central location. Trainee-directed activities outside of the center are the exception rather than the rule. The central training facility is necessarily in a fixed location.	The field-based portion of the training is generally organized around technical training, though the other components of training are integrated.	D.	Independent, community-based training activities are linked to periodic (weekly) training "seminars," which form the bulk of group training. The central seminar site need not be in a fixed location.
E.	All administrative and managerial functions are handled by training staff from a central training facility.		E.	Many administrative and managerial functions are relegated to facilitators and trainees themselves, and handled at the community level.
F.	Training staff have supervisory functions within a training center location. All training staff are present throughout training.	Trainees are often tasked with designing and implementing a small community project.	F.	There are no supervisory personnel. The facilitator serves as a "guide," but trainees and facilitators negotiate roles and responsibilities for learning and behavior. Senior training staff make occasional visits.
G.	Local community members and resources may assist with training, but training staff assume responsibility for identifying and arranging for cooperation. Most information is transmitted to trainees through the training staff.	They usually stay with a family and often return to the training center at the end of the field-based component.	G.	A variety of community members are called on to cooperate with training activities. Trainees (with facilitators) are charged with seeking out local people and resources. Most information is transmitted directly to trainees from local resources.
H.	Most training takes place in classrooms at the central training facility.		H.	Most training takes place in trainees' homes or another place chosen by trainees and facilitator.

Appendix 10

Description of Work Format

Peace Corps/Panama

The following format provides trainers and programming staff a structure to use when they share and discuss the knowledge, skills, and attitudes that trainees and Volunteers need to be successful in their assignments. It also asks for information on sites and resources. Trainers use the information to design training events. (Expand the space on the form as needed.)

Acquired Competencies

List 10 skills (concrete) that trainees will need to have by the end of training in order to be effective Volunteers. For example, knowing how to organize a seminar would include planning it, inviting people, preparing materials, learning vocabulary, giving the seminar, and giving follow-up.

Technical Week

Write down five themes to be covered during Tech Week.

Project Plan

In a paragraph, describe what the focus will be with this training group regarding the project. For example, the community environment education trainees will be working in coastal communities with local fisherman to improve results in fish production while preserving the environment. This will be in addition to working in the schools.

Based on your own perspective and your project plan's perspective, why is the Peace Corps here in Panama?

VAD

What changes, if any, do you anticipate from the Volunteer assignment description these trainees received?

Site Information

In order to prepare the trainees with realistic and accurate situations, provide the following information about the sites you are investigating for this training group.

List of Possible Sites

List sites. Next to each one indicate if this is the first, second, or third Peace Corps Volunteer at the site. When was the last Volunteer there and in what sector?

Indigenous Sites

How many?

Which indigenous group(s)?

What languages are spoken?

Size

What is the population of the largest site?

What is the population of the smallest site?

Special Needs

Do any of the sites that you have selected/are selecting have a special challenge, problem, or need that is not covered in the calendar of training events (e.g., a high rate of malnutrition, alcoholism, or violence; only women's groups in the community; problems with people of different racial backgrounds)? If so, please list.

Training Objectives

Training includes the following components: language, technical, and common areas. The common areas include cross-cultural themes, the roles of the Volunteer in development, health and medical Issues, safety, Peace Corps/Panama policies and resources, American diversity, and working with Counterparts.

Language

List 15 topics that should be covered in language that would enable the Volunteer to communicate more effectively in his/her job (e.g., conducting meetings, making appointments, speaking on the telephone).

Technical Vocabulary

In which specific technical themes do trainees need to acquire vocabulary (e.g., deforestation, accounting, or teaching a lesson in a school)? Using the example of teaching a lesson in a school, the trainees would learn all the vocabulary needed to successfully teach a lesson in the classroom.

Integrated Areas

For each topic below, list at least six concepts that should be covered during the Friday (integrated) sessions. Keep in mind that there are only eight Friday sessions, which add up to 52 hours in total.

Cross-Cultural Themes

The Roles of the Volunteer in Development

Working With Counterparts

Safety

Health

American/(Panamanian) Diversity

Country-Specific Information

Peace Corps/(Panama)

In-Service Training

The first IST is made up of 50 percent language and 50 percent technical, cross-cultural, safety, and program sessions. The second IST is divided 70 percent and 30 percent. List topics that should be covered for both ISTs that cannot be covered during the PST or may need to be touched upon again.

First IST (December)

Second IST (July)

Resources

List any resources below that would be helpful to the technical trainer in planning and implementing the training program.

Speakers

Name	Agency	Phone #	Would be good for (which topics) ...	Speaks English?

Written Information

Current, up-to-date information about the project can be found in the following places.

Name	Location	Information Available	Phone #

Appendix 11

Content for Training Events

Some posts using community-based training (CBT) place more emphasis on language, cross-cultural, and community development skills during PST. They then bring Volunteers back together after three or four months at site for a more concentrated block of technical skills training. Some posts emphasize technical training for one to two weeks during PST. Each post and each sector decide how important technical skills are for Volunteers during their first few months compared with the skills that trainees already have and the nature of their assignment.

Some posts hold ISTs that concentrate strictly on language skills. They use sector meetings or technical ISTs to address technical skills and community development topics. Other posts cover competencies in all the components during a general IST. Some posts include Volunteer counterparts in ISTs to build their capacity and foster teamwork. Counterparts may also attend parts of the COS conference to plan with their Volunteers ways to make the work they have done together more sustainable.

The following is a list of topics and activities that are typically covered in the different training events. Notice that some of the topics are the same. When the topics are covered depends on the needs of the Volunteers and the topics that staff feel are important.

Use the list as you work with other staff to develop training events.

In-Service Training

- language skills
- a review of the first three to six months: accomplishments and challenges
- technical competencies as identified by Volunteers and staff
- working with counterparts, problem solving
- cross-sectoral collaboration
- cultural adjustment
- dealing with uncomfortable situations: ethics, abuse, alcoholism, etc.
- update on project: activities, project review, individual meetings with staff
- ideas for secondary activities, summer activities
- funding sources through the Peace Corps, the American Embassy, others, websites
- fundraising ideas, writing grants
- peer support techniques: listening skills
- NGOs: who they are, how they operate, how to work with them
- health and safety topics
- policies for time away from site
- administrative issues and processes
- plans for the next six to nine months
- immunizations

Mid-service Conference

- a review of the last year: accomplishments and challenges
- cross-sectoral collaboration (especially important if this is not a focus in PST or IST)
- funding for projects
- stress management, time management
- peer support techniques: listening skills

- updates on the situation in ministries and the country's politics and economy
- update on Peace Corps policies
- review of the project plan by sector, review of task analyses, training competencies
- individual meetings with programming staff
- health and safety topics
- plans for the next year, with a focus on sustainability
- immunizations

All-Volunteer Conference

- networking and sharing ideas
- cross-sectoral collaboration
- cultural adjustment
- NGOs: who they are, how they operate, how to work with them
- feedback to sectors, review of project plan, tasks, competencies
- feedback to the Peace Corps on Volunteer support, training, programming, medical, administration
- recommendations for PST
- update on the Peace Corps, headquarters, and post
- "hot topics" of concern to all groups, such as safety issues, new initiatives
- team building between Volunteers and staff

Close or Continuation of Service(COS)

- celebration of accomplishments and personal growth during the past two years
- giving feedback on the Peace Corps program
- information on and skills in writing résumés, networking, going back to school, retiring
- reverse culture shock: readjusting to life in the United States, issues and strategies
- sector meetings, project review and feedback, individual meetings
- plans for the last three or four months at site, with a focus on sustainability (may include counterparts)
- plans for the first several months after returning home
- administrative processes for leaving

Appendix 12

Tips for Designing ISTs and Mid-service Conferences

As you plan the methodologies that you will use in training, remember that the group you trained during PST may be very different from the group that arrives after months of living and working at site. In fact, you may not recognize them! Not only will they have changed physically, but they will also have grown in what they know, what they have experienced, the skills that they have, and the way that they act and react to their experience as Volunteers.

Keep the following in mind as you develop training:

Volunteers are eager to reconnect and share their experiences.

Include time for the initial greetings, stories, and celebrations both on the night Volunteers arrive and during the first session.

Volunteers come with their own case studies.

They will have real issues that they are dealing with around cultural behaviors, ethics, work issues, and relationship issues.

Use their experiences in case studies with their permission. This is a particularly important time for trainers to encourage reflection.

Volunteers learn from one another.

Allow for listening and problem solving.

Often Volunteers are more receptive to training because they see the need for additional information and skill building.

Trainers can provide challenging hurdles for them to master in technical and language skills. Build on the competencies introduced during PST and introduce new ones that are relevant for the next six to nine months.

A common theme is counterpart relations.

If this topic is not covered in the counterpart conference during PST, consider bringing counterparts in for a day or two during an IST or mid-service conference to support team building.

Volunteers know what they want, and they are motivated to learn.

Allow them to design and facilitate a major portion of the training event.

Volunteers want to learn and share according to their needs.

Provide open space to accommodate different interests.

After months at site, Volunteers have a more realistic idea of what they are able to accomplish. They realize that it takes a series of small steps, rather than a single bound, to climb a tall mountain.

Provide time for them to plan what they want to accomplish, both personally and professionally, over the next six to 12 months.

Volunteers also need time to decompress.

Build in blocks of time when they can relax together. As in open space, sharing and networking continue through the informal times as well as during planned sessions.

Appendix 13

General Calendar of Events (COTE) for PST

As staff design PST they develop a calendar that identifies the dates for major training events, including:

Trainee arrival	Site announcements
Trainee movement between training sites	Site visits (to Volunteers and/or assignment)
APCD interviews	Group meetings
Assessments	Supervisor/counterpart conference
Village stays	Swearing in
Practicum	Move to site

By keeping the scope broad staff can focus on the flow of the entire training before they get immersed in the details. The calendar below helps staff as well as trainees understand the overall timing of PST.

As programming and training staff design the calendar for PST they discuss the following questions:

When should the host family stay begin? The first day? After several days? The third week?

How long should the home stay be? Several weeks? The entire PST?

How many site visits should trainees make? One to a Volunteer and another to their own site?

When should the Volunteer site visit be? At the beginning of PST, so that trainees see what their life will be like and understand the value of training? In the middle?

When should site placements be announced? Early to put trainees in the right language groups? Mid-PST to stimulate self-directed learning? Later in PST to allow more time to get to know trainees so that staff can make a better site placement decision?

When do trainees visit their sites?

When should the supervisor/counterpart conference be? Before site visits? Just before swearing in? How many days should it be? (While programming staff are usually responsible for planning the supervisor/counterpart conference, training staff can provide ideas for designing sessions and activities. They also will need to prepare trainees for the event.)

In community-based training, how often should the cluster groups meet? Every week? Every other week? For how many days?

The answers to the above questions depend on the training objectives, the amount of time that it takes to travel between sites, staffing, the budget, and the tradeoffs that staff have to make to balance all the variables that exist during PST.

Helpful Hint: Sticky Notes to the Rescue!

In preparation for the meeting when staff plan the general calendar, make a calendar on large sheets of paper. Then, during the meeting, place sticky notes, each labeled with one of the major events, on the calendar. This allows you to move the events around as the group makes different suggestions and eventually comes to a consensus.

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Pre-Service Training Calendar of Major Events

Example for Education Volunteers in Community-Based PST

Revised xx/xx/xx

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
WK 1	SEPT. 1	2	3 Group Arrives	4	5	6 Street Smarts Bus Rally
7 WK 2	8 Trainee Interviews	9	10	11	12	13 To Training Sites & Host Families
14 WK 3	15 Begin Community Projects	16 Classroom Observations	17	18	19 Classroom Observation	20
21 WK 4	22 Site Announcements	23	24	25	26 Group Meeting Assessments	27 Group Meeting
28 WK 5	29	30 Mini-Practicum	OCT. 1	2	3 Group Meeting	4 Group Meeting
5 WK 6	6	7 Mini-Practicum	8 Mini-Practicum	9	10 Community Projects Fair	11 Site Visits
12 WK 7 Site Visits	13 Site Visits	14 Return From Site Visits	15	16	17	18
19 WK 8	20 Practicum	21	22	23	24 Group Meeting	25 Group Meeting Assessments
26 WK 9	27	28	29	30	31	NOV. 1
2 WK 10	3 Return to Central Site	4 Final Interviews	6 PST Evaluation	5 Supervisor Conference	7 Sup. Conf. Swearing-In Banquet	8 Leave for Sites

Notes From the Field: Don't Chop It Up!

Peace Corps/Zambia has found through experience that "the blocks of community-based training time need to be larger and less chopped up." A number of additional posts using community-based training report that holding group meetings every weekend takes too much time away from communities. Consequently, they recommend meeting every other week or another configuration that reduces the number of meetings.

Calendar for Staff

Staff also benefit from developing another calendar that highlights major events for PST staff and post staff. This includes all the information above, plus dates for when interim and final reports are due, staff meetings, trainee assessment meetings, matching trainees to sites, staff evaluations, PST and Peace Corps staff evaluation of PST, etc. Give a copy of the staff calendar to each person on the training team as well as appropriate Peace Corps staff.

Appendix 14

Timeline for PST Preparation

This timeline is an example of a project management tool. Prior to each training event it is helpful to identify who will do what by when. The tool is then updated and shared during progress report meetings.

Abbreviations: AO = administrative officer; APCD = associate Peace Corps director; CD = country director; HFC = host family coordinator; LC = language coordinator; LCF=language/cross-cultural facilitator; PCMO = Peace Corps medical officer; PTO = programming and training officer; TM = training manager.

Revised: __/__/__

Time to PST	Activity	Responsibility
6-12 months	Participate in IPBS to identify resources needed for training (PST expenses, staffing, USPSC, ISTs, etc.)	All staff
	Confirm PST budget with PC headquarters.	AO, PTO, TM
	Identify guidelines for training salaries, per diem, host family contributions, training facility costs, walk-around allowances, etc.	AO, PTO, TM
	Identify effectiveness of past PSTs and recommendations.	TM with PTO
	Make recommendations on PST structure and any changes in approach, sites, etc.	TM to PTO to CD
	Communicate changes to Peace Corps staff, Volunteers, and communities.	TM, PTO, CD
4-6months	Develop, review, or revise task analysis and training competencies.	TM and APCD
	Develop, review, or revise objectives of training components.	TM review with APCD
	Identify, review, or revise criteria for training site selection.	TM and PTO review with PCMO and CD and report to PC staff
	Identify, review, or revise criteria for host family selection.	TM and PTO review with PCMO and CD and report to PC staff
	Identify Volunteers who will help with PST.	APCD, TM
3-4 months	Meet with community officials to identify training sites and facilities and opportunities for skill practice.	TM, training staff
	Identify training sites that meet criteria.	TM, review with PTO, CD
	Identify logistics: communications, transportation, medical facilities, meals, etc.	TM, AO, PCMO
	Identify housing for staff, if necessary.	TM, AO
	Identify and agree on all renovations to be made to housing and training facilities.	AO, TM, training staff
	Sign contracts for training sites and housing.	AO

	Document Emergency Action Plan	AO and PCMO
	Send Welcome Book and language materials, if appropriate, to Desk	TM, LC
	Develop, review, or revise description of work for technical trainers, facilitators, and administrative assistants.	TM with PTO, report to AO
	Advertise for training staff and coordinators.	AO
	Purchase materials and equipment.	AO
2-3 months	Hire and train host family coordinator (HFC).	TM
	Hire and train host family recruiter(s).	TM and HFC
	Begin identification of host families.	HFC and recruiters
	Develop, review, or revise trainer handbooks.	TM, PTO
	Recruit, interview, and hire PST staff.	TM, PTO, AO
	Hire and bring on board PST director, if appropriate.	TM, PTO, CD
	Develop, review, or revise training curriculum for each sector.	TM, APCD
	Develop, review, or revise training handbooks and texts.	TM, tech trainer with APCD
	Develop assessment indicators, process, and tools for training program, trainees, and staff.	TM, PTO, PST director
	Set up all logistics: communications, transportation, payment systems, etc.	AO, TM, PST director
	Design training of trainers (TOT).	TM, PTO, APCD, PCMO, CD
	Develop, review, or revise training assessment process and training report process/documents.	APCDs, TM with PTO and CD
1 month	Hold PST staff TOT, orientation, and preparation for training.	TM, PTO
	Coordinate with training site community agencies and support organizations.	TM, PCMO, AO
	Finalize host families and hold orientation.	HFC
	Hold orientation for community mentors.	TM, PST staff
	Develop calendar of training events. (COTE)	PST staff
	Develop session and activity outlines.	PST staff, review with TM, PTO
1-2 weeks	Move to training site(s) and seminar site.	PST staff
	Prepare site(s) for training.	PST staff

Each staff member on the list receives a copy of the timeline as well as all updates. The list is a useful tool for training managers to refer to at meetings when they give status reports on the preparations for PST.

Appendix 15

Four-Tiered Preparation for PST

Tier 1: PST Planning

The country director, programming staff, and administrative staff meet with the training manager or PST director. The group discusses budget requirements, general information about training goals and objectives, project updates and needs, numbers of trainees per project, site information, language requirements, and plans and processes for hiring language, technical, and administrative training staff. These meetings take place at least four to six weeks prior to PST if the PST director is new to the post. If the PST director is full time, these conversations take place during the IPBS process and on an ongoing basis several months prior to PST.

Tier 2: Coordinators Workshop

The **training manager or PST director** prepares the **training management team** in a coordinators workshop that takes place at least three weeks prior to PST. The workshop can last three or four days, depending on the experience of the team and the groundwork that has already been laid in past PSTs. At this workshop, the training manager or PST director prepares the component coordinators (technical, language and cross-cultural, administrative) to play major roles in orienting and helping develop the skills of new staff members as well as plan the overall structure of the training. Programming staff provide information on the projects and site placement. The group reviews reports from previous PSTs, reviews their responsibilities for the budget, reviews and updates project task analyses and related lists of competencies, identifies opportunities for integrating components, and develops plans for community activities and projects. The group also begins to lay out the major components of the calendar of training events. In some countries coordinators also hire training staff. This requires time to help new staff develop skills as well as apply skills.

Tier 3: Training of Trainers Workshop

The **training management team** prepares **language and cross-cultural facilitators (LCFs), technical trainers, Volunteers, and training administrative staff at least three or four weeks prior to PST.** Community mentors and coaches who play a significant role in PST may attend appropriate sessions. Posts often divide the content of the workshop into two areas, staff development and PST content preparation. Descriptions of each follow.

Staff Development: Content includes an orientation to the Peace Corps, the training philosophy, and PST; elements of successful teamwork; the role of the Volunteer in development and the post's projects; training and facilitation skills; integrating the components; reviewing training assessment policies and processes; and developing a calendar of training events. The length of the training of trainers depends on the experience of the team.

PST Content Preparation: Trainers work with the training management team to develop session plans and materials based on task analyses, competencies, component integration opportunities, and feedback on past PSTs. During this time trainers apply the knowledge and skills that they gained during the staff development phase of the training of trainers. The length of this work period depends on the experience of the team and the quality and appropriateness of the sessions and materials that have been used in previous PSTs.

Tier 4: Site Preparation

Language and cross-cultural facilitators and **technical trainers** orient and train the community, including community mentors and counterparts and host families. They also prepare the training site facilities. Site training and preparation may take three or more days.

The length of the training of trainers depends on a number of factors, including the following:

- The number of times that the training design has been used successfully and the amount of development or revision that needs to be done
- The number of training sites and the experience of the community working with the Peace Corps
- The experience of the staff with training methodology, facilitation, self-directed learning, and working with the Peace Corps
- The extent to which competencies have been developed from project tasks
- The extent to which training objectives have been identified and sessions and activities developed

Appendix 16

Staff Preparation for PST

The following questions and related topics help training staff frame, from the learners' perspective, the information and skill building that need to be included in an orientation to the Peace Corps. Both training and programming staff provide the information in sessions to help staff prepare for PST.

What are we here to accomplish?

- Goals of the Peace Corps and the country program
- Objectives of PST and its role in the two-year training cycle
- Overview and agenda
- Needs of the group that drive the agenda

How can we work effectively as a team?

- The members of the team and their professional experience
- Personal information for team-building purposes
- Roles and their interdependence
- Diversity
- Key strengths and needs
- Elements of effective teamwork
- Phases of group development
- Norms
- Coaching and mentoring
- Staff members at the post and how they relate with the PST team

What are the Peace Corps' policies and procedures?

- Statement of work
- Professional conduct and expectations
- Preventive health measures and procedures
- Pay schedules, per diem, receipts, etc.
- Vehicle and equipment usage
- Security of equipment and materials

Why do Volunteers join the Peace Corps?

- History of the Peace Corps
- Selection process of trainees
- Expectations of trainees

What do Volunteers do in this country?

- In-country program and sector
- Overview of principles of development, strength-based approach
- Community assessment approaches and tools
- Role of the Volunteer in development

- Project plan overview
- Site placements and assignment process
- Resource documents: VAD, site journals, Volunteer reports
- Resource people: Volunteers, counterparts, supervisors, host families

What makes Volunteers successful?

- Characteristics of effective Volunteers and implications for training
- Task analyses and related competencies based on each project plan
- Language needs
- Diversity among Volunteers and implications for training
- Trainees' strengths and needs

What are the challenges of living and working in another culture?

- Comparison of American values and host country's values
- Cultural integration, culture shock, and the implications for staff
- Staff's role as cultural informants or guides
- "Day in the life" of a Volunteer, panel, and/or visit to Volunteers or sites

What are the Peace Corps principles and practices that govern PST?

- Adult learning principles and experiential learning cycle
- Learning styles, self-directed learning
- Competency-based training
- Community-based training
- Health, safety, and emergency action plan
- Trainee support
- Asset approach to development and resource management
- Integration of programming and training

How can we design an effective training?

- Characteristics and skills of good trainers
- Calendar of training events
- Integration of components to reflect Volunteers' realities
- How to write behavioral session objectives
- Designing sessions and activities
- Presentation and facilitation skills
- Listening and feedback skills
- Training resources (PST reports, community, agencies, Volunteers, ICE, etc.)
- Visit to training site and identification of community resources
- Developing materials, training syllabus, readings

How can we effectively assess training?

- Informal and formal assessment processes
- Reporting requirements, process and formats

- Trainee assessment process and tools, role of self-assessment
- Staff assessment process and tools, role of self-assessment
- Communicating, coaching, mentoring
- Giving and receiving feedback
- Roles and process for documenting performance (staff and trainees)
- Early termination processes and procedures
- Administrative separation process

Within each of the topics there are areas that include both knowledge and skills. Some of the topics take very little time to cover, while others require more time for group work and practice, observation, and feedback. At the beginning of staff preparation, the learners can complete a self-assessment tool to identify what is most important to them and where they feel they need information and skills.

Appendix 17

Trainee Assessment Roles and Responsibilities

The following list is based on the assessment process used by Peace Corps/Jamaica. Posts assign the roles and responsibilities to staff based on the PST model and staffing patterns at the post. Use the list below to ensure that the process is carried out appropriately and that the necessary information is included in trainer and trainee documents and training sessions.

Each trainee

- receives general information on the assessment process prior to coming to the country.
- attends a session on the details of the assessment process early in training.
- completes a self-assessment and identifies his/her strengths and weaknesses.
- meets with staff to discuss his/her progress throughout training.
- suggests potential solutions or ways to improve performance or attitude.
- acknowledges potential outcomes and consequences of behavior.

The training director

- ensures that the training staff know their roles and responsibilities and use the evaluation process correctly.
- gives support and guidance to the training staff if they have questions or problems with the evaluation of trainees.
- keeps the country director informed of problems that could lead to disciplinary action.
- consults with trainers as to what constitutes a problem behavior and how it should be handled.
- directs the trainers to document any behaviors that are problematic.
- follows up with trainers about problematic behaviors to identify progress.
- summarizes all verbal and written reports about problematic behavior and puts them into one summary report that can be reviewed with the trainee.
- consults with the country director before written documentation is discussed with a trainee.
- delivers summary feedback to the trainee when a behavior may warrant administrative separation.
- treats all performance issues with appropriate confidentiality.

The technical trainer, cultural and community development coordinator, or language and cross-cultural facilitator (LCF)

- demonstrates knowledge of roles and responsibilities in the assessment process.
- provides feedback to trainees through formal meetings and informal discussions.
- asks questions when there are problems with the assessment of trainees.
- documents in personal notes any behaviors that are problematic.
- uses the performance or behavior report form when appropriate.
- consults with the training director as to what constitutes a minor versus a serious behavior or problem and how it should be handled before giving feedback to the trainee.
- reports to the training director any problematic behaviors or continuance of problems to identify solutions.
- gives verbal and written reports about problematic behavior to the training director for use in the summary report that is reviewed with the trainee if probation is the next step.
- gives feedback to APCD to help in site assignments.

- apprises APCD of any on-going trainee problems.
- meets with APCD to review assessment interview before and after interviews take place.
- treats all performance issues with appropriate confidentiality.

The Peace Corps medical officer

- gives feedback in areas that relate to medical issues.
- reports to the training director problematic behaviors and prepares any necessary written reports.
- notifies the country director, training director, and APCD concerning medical separation or medical-related resignations.
- notifies the country director, training director, and APCD of circumstances that impact trainee placement.
- treats all personal information with appropriate confidentiality.

The host family coordinator

- gives feedback to the training director or trainer in matters related to relationships with host families.
- prepares any necessary written reports.
- treats all issues with appropriate confidentiality and requests that host families do the same.

The APCD or program manager

- gives feedback in areas that relate to site placement during training.
- consults with the technical trainer and training director concerning trainees who receive written feedback or probation.
- consults with technical trainers before and after assessment interviews.
- consults with the training team as decisions are made on trainee site placements.
- treats all performance issues with appropriate confidentiality.

Volunteers or Volunteer PCVCs (Peace Corps Volunteer Coordinators)

- are not formally involved in the assessment or evaluation of trainees or Volunteers.
- report observations to the training director and training staff with whom they are working.
- treat all performance issues with appropriate confidentiality.

The country director

- is consulted prior to providing written feedback to the trainee.
- is consulted when administrative, medical, or interrupted-service (which replaces non-disciplinary discontinuance of service) separation is being considered.
- is consulted when a trainee is considering resignation.
- conducts the final interview with each trainee and confirms the two-year commitment.
- treats all performance issues with appropriate confidentiality.

Appendix 18

Questions to Guide Action Planning for Training

Use the following questions to guide discussions in preparation for strategic planning.

- ❑ What is the strongest area of our training program right now? What has made it strong? How can we take what we have learned and use it elsewhere?
- ❑ What is the weakest area of our training program right now? If we launch a major effort to improve it, what can we accomplish? What resources will we need?
- ❑ When was the last time we tried something radically new to improve training's effectiveness? What was it? Did it work? What changes did it bring about? What did we learn by trying it?
- ❑ Who is involved in training now? Who should be? How can we get them more committed and involved?
- ❑ How are we determining the content of training events? How are we finding out what Volunteers need? What tools or methods can we use to get better information?
- ❑ Are we trying to cover too much or too little in PST? What information and skills are better covered in ISTs? Are there technical skills or community integration skills that need greater emphasis in PST or IST?
- ❑ Are there any changes that will impact the content of our next training event(s)? Are there changes in the project plan(s) that need to be taken into consideration? How is the next group of trainees different from those in the past?
- ❑ Do the methodologies that we use mirror the principles of adult learning? What percent of training is experiential? What percent is learner driven?
- ❑ How are we determining the effectiveness or impact of training? Are we getting useful information on the changes that have occurred because of training? What new assessment methods can we pilot?
- ❑ How can we increase the staff's skills in the design and facilitation of training? What staff development opportunities are there within the post, country, subregion, or region? How can we use U.S. personal service contractors to build the capacity of our training team?
- ❑ What is our action plan for the coming year? What will we do, who will do it, what resources do we need, and by when will it be done?

Once you identify where you want to go and the process for getting there, your team needs to identify the resources required to support your plans. Resources might include funding to support training events or materials development. They might include funding to support staff development or capacity building for community partners. Resources might also include additional staffing or the use of personal service contractors.

Appendix 19

Questions to Guide Resource Planning for Training

Consider using the questions below to help you identify the resources needed for training.

- ❑ If we are planning to change our PST model, how will the change impact costs for staffing, transportation, supplies, and equipment? Will staff be traveling more frequently to develop and manage training sites?
- ❑ Will we need a U.S. personal service contractor or a host national to manage PST or conduct technical training?
- ❑ Do we need outside assistance to evaluate our training program or assist in designing a new approach to PST?
- ❑ How many Volunteers and host country nationals will we include in PST? What are the costs for their travel, lodging, and per diem?
- ❑ Are we holding more or fewer training events in the upcoming year? Will there be more or fewer Volunteers at each event? What will be the increase or decrease in costs?
- ❑ Will we include community partners in ISTs or conferences? What will the costs be, and can we get funding to support their involvement?
- ❑ Will staff be making more site visits as part of our new approach to training assessment?
- ❑ What cost implications are there in our plans for staff development? Will staff be going to subregional conferences, and will they be conducting site visits to other posts?
- ❑ Have training costs for lodging, meals, and materials increased over the past year?
- ❑ What is the expected increase in the cost of living in the country? What impact will any increase have on host country national trainers' salaries and payments to host families?

Appendix 20

Programming and Training Budget Cycle Questions

As programming and training staff prepare for the IPBS, they answer the following questions:

Budget Cycle	Programming	Training
IPBS Strategic Planning (March)	What are programming priorities for the coming year? Associated costs included? Anticipated growth to post programs? Changes to program goals and objectives? Are more site visits required? Will host families be used? Changes in payment? New equipment? New staff? Any decreases in funding from program changes? Estimate of SPA funds request?	What are training priorities for the coming year? Current plan and enhancements? Is post moving to community-based training? Is more travel money needed? Are more trainers needed? New equipment or supplies needed? Increase in home stay allowance? Facilities rentals? Request for U.S. personal service contractor? Center funds requests?
Operating Plan (July)	Do we need more training events? Are more staff in-country travel trips needed? Request of Center-funded activities? Request of SPA funds and AOL Peace Pack, etc.? Are additional program support personnel needed?	Develop proposed PST training Provide PST title, dates, number of trainees, and location How many trainers are needed? Review budget line items Develop proposed IST. New venue? More or less expensive? Provide IST title, dates, number of Volunteers, and location
Periodic Budget Review 1 (January)	Change in budget/Center requests (add, delete, change) Are there new requirements that should be in an unfunded request? Has the estimated number of Volunteers at post changed?	Any changes to PST events? Has the estimated number of trainees at post changed? Review budget line items Any changes to IST events?
Periodic Budget Review 2 (June)	Change in budget/Center requests (add, delete, change) Are there new requirements that should be in an unfunded request? Has the estimated number of Volunteers at post changed?	Any changes to PST events? Has the estimated number of trainees at post changed? Review budget line items Any changes to IST events?

Appendix 21

Post Programming and Training Readiness Survey

(Based on an instrument used at the Morocco Programming and Training Conference, January 2001)

The following questionnaire assesses the extent to which a post has "what it takes" to implement the principles of the Peace Corps' programming and training (P&T) vision. For each of the nine elements of the programming and training vision, there are questions that help posts rate their readiness. After rating each question, staff identify the activities that they need and want to address as a team.

Answer each question by writing in the space provided a number from 1 (not at all) to 5 (completely).

	Rating
(A) Building team effectiveness is not an event, but a process; not episodic, but ongoing; not outside the organization, but ingrained in the day-to-day operations.	
1. To what extent are all P&T staff members' opinions and contributions valued?	
2. To what extent does post's organizational culture nurture a climate of trust among the staff?	
3. To what extent is there mutual respect and are all prepared to listen to one another?	
4. To what extent does the P&T staff function as a team to solve organizational problems, issues, or challenges?	
5. To what extent are post's P&T teams able to achieve their purpose and goals?	
6. To what extent are controversial issues addressed and resolved rather than avoided?	
7. To what extent are members of the administration and medical units included in P&T efforts (and vice versa)?	
8. To what extent is there enjoyment and satisfaction in working together?	
9. To what extent do P&T staff share a common vision and goals?	
10. To what extent do the P&T staff understand their roles and responsibilities?	
11. To what extent does every P&T staff member take responsibility to ask the question "What can I do to be a more productive member of the team?"	
(B) P&T staff in carrying out their daily activities utilize a number of skills.	
1. To what extent do staff have the technical expertise to do their jobs—administrative systems, processes, site development, etc?	
2. To what extent is staff trained to handle issues involving diversity—gender, sexual orientation, skin color, age, learning styles, physical disabilities, socioeconomic status, ethnicity, etc.?	
3. To what extent is staff trained to facilitate group processes?	
4. To what extent is staff trained to cope with conflict?	

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5. To what extent is staff trained to assist Volunteers in resolving their issues?	
6. To what extent does staff understand the Peace Corps as a community development agency?	
7. To what extent is staff trained to use available computer technology?	
8. To what extent are staff members' communications clear, timely, and professional?	
9. To what extent does every P&T staff member take responsibility to ask the question "What can I do to increase my repertoire of skills, which will also improve the post's program?"	
(C) Successful integration of programming and training depends on (1) trainers understanding what Volunteers need to implement post's projects and (2) programmers' involvement in the design and implementation of a training strategy and content.	
1. To what extent is training content based on a project's goals and objectives?	
2. To what extent is training experiential?	
3. To what extent are all Peace Corps staff involved in training?	
4. To what extent are all Peace Corps staff involved in programming?	
5. To what extent is integration valued?	
6. To what extent is there a shared understanding of post's Peace Corps vision among all staff?	
7. To what extent does mutual support exist among staff?	
8. To what extent do post staff understand their own roles and responsibilities?	
9. To what extent do post staff understand their colleagues' roles and responsibilities?	
10. To what extent are post staff's unique assets recognized, valued, and utilized?	
11. To what extent are all post activities ongoing and interconnected?	
12. To what extent are information and resources shared among staff?	
13. To what extent do staff ask the question "What can I do to promote the integration of post activities?"	
(D) A well-developed network of strategic partnerships with other organizations is essential to the success of post's program.	
1. To what extent do Peace Corps partnerships provide significant benefits for both organizations?	
2. To what extent is programming and training information regularly shared with partners?	
3. To what extent do partners share information or resources with the Peace Corps?	

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4. To what extent do programming partners work in a collaborative way with Volunteers?	
5. To what extent are the Peace Corps' partners regularly recognized and thanked?	
6. To what extent do P&T staff take responsibility to ask the question "What can we do to develop more productive partnerships?"	
(E) The ability to manage resources includes managing human resources and personal time as well as physical resources.	
1. To what extent do staff have a shared vision?	
2. To what extent is there openness to work as a team?	
3. To what extent do staff accept personal responsibility and feel empowered?	
4. To what extent are ideas of staff and Volunteers utilized to most effectively manage resources?	
5. To what extent are goals carried out consistently with the appropriate resources?	
6. To what extent is available technology used to maximize the effective use of resources?	
7. To what extent is there quality and transparency in the flow of information?	
8. To what extent is there a consistent and inclusive performance appraisal process?	
9. To what extent do P&T staff take responsibility to ask the question "How can we better utilize resources—human, personal time, and physical resources?"	
(F) Sector projects organize the work of Volunteers, enabling them to encourage positive change in the lives of people in their host country.	
1. To what extent are projects relevant to the needs of people, and do they effectively reach the target population?	
2. To what extent do project plans clearly communicate to stakeholders (Volunteers, counterparts, agency partners, target groups, programming and training staff) what activities are to be carried out and what the expected outcomes are?	
3. To what extent do projects integrate the use of appropriate technology?	
4. To what extent are project stakeholders involved in designing, implementing, and assessing projects?	
5. To what extent do projects include the members of society who do not normally have access to opportunities, i.e. women, youth, minorities?	
6. To what extent do written project plans reflect what Volunteers are actually doing?	
7. To what extent do P&T staff ask the question "What can we do to improve post's projects?"	
(G) Monitoring is a means of organizational learning—a way for the organization to assess its progress and change in ways that lead to greater achievement of its mission.	

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1. To what extent do project plans have meaningful and feasible monitoring and evaluation plans?	
2. To what extent does post collect information from relevant stakeholders?	
3. To what extent do the data collected provide useful information about whether Peace Corps P&T objectives (activities and outcomes) are being achieved?	
4. To what extent is post staff encouraged to learn from prior experience?	
5. To what extent does the post learn from prior experiences?	
6. To what extent do Volunteers receive monitoring results?	
7. To what extent are monitoring reports easy to complete and simple to interpret?	
8. To what extent do you have confidence in the reliability (accuracy) and validity (meaning) of the data?	
9. To what extent does the post use monitoring data to make decisions?	
10. To what extent is staff developing, and aware of, criteria for closing a site or ending a project?	
11. To what extent do P&T staff ask the question "How can we improve our monitoring and better utilize the information?"	
(H) Self-sufficient Volunteers (those with abilities to function effectively) are key to the success of post' program.	
1. To what extent do Volunteers' language skills allow them to accomplish both the Peace Corps' goals and project goals?	
2. To what extent are Volunteers' technical knowledge and skills sufficient to accomplish project goals?	
3. To what extent do Volunteers understand their roles as development workers?	
4. To what extent do Volunteers have meaningful jobs?	
5. To what extend are Volunteers building the capacity of host country individuals, organizations, and communities?	
6. To what extent are Volunteers successful in sharing their American culture?	
7. To what extent are Volunteers respectful of their host country's culture and prepared to share the culture with friends and family following their Peace Corps service?	
8. To what extent are Volunteers' sites safe enough that you would feel comfortable having a member of your own family living and work at their sites?	
9. To what extent are Volunteers "low maintenance" (self-sufficient)?	

10. To what extent are Volunteers satisfied with their service?	
11. To what extent do P&T staff ask the question "What can we do to better prepare and support Volunteers so they will be effective, 'low maintenance,' and satisfied?"	
(I) The function of the extended team (regional and Center for P&T staff) is to assist field staff by providing timely and useful technical information and appropriate and useful P&T feedback.	
1. To what extent are you able to access timely and useful technical information or assistance from the region or the Center?	
2. To what extent are communications from the extended team clear, professional, and timely?	
3. To what extent are data collected for headquarters valuable for post?	
4. To what extent is feedback from the extended team timely and constructive?	
5. To what extent do P&T staff ask the question "How do we strengthen collaboration with the extended team?"	

Appendix 22

Characteristics of an Effective Team

Whenever there is increased cooperation and coordination among staff, the synergy created makes the whole greater than the sum of its parts. And even though one might assume that teamwork comes easily, staff who have worked together successfully know that it requires conscious effort and ongoing attention. Use the checklist below to analyze, reflect on, and discuss how well staff are laying the groundwork for working together as a team.

The characteristics of an effective team can be summarized on five fingers. The following elements form the five R's of team building:

1. Reason: Team members strive toward a common purpose when

- Leadership articulates a clear vision.
- Team members understand the rationale for tasks.
- There is consensus around principles of operation.
- Members of the team model what they preach. They "walk the talk."

2. Roles: Team members function effectively when

- Delegation of workload is fairly balanced.
- Team members recognize their interdependence.
- People have the competencies required for their jobs.
- They know what needs to be done, how, by whom, and by when.

3. Rules: Systems facilitate and reinforce operations when

- There are predictable operating patterns.
- Systems build on successes and best practices.
- Systems anticipate problems.
- Systems are consistent, yet flexible and responsive.
- Systems reflect efforts to be fair.
- Decisions are not personalized.

4. Relationships: Teamwork is supportive when

- Team members work to build trust.
- Team members value diversity.
- Team members listen actively.
- Team members communicate respectfully.
- Team members give constructive feedback.
- Team members manage internal competition.
- Team members have fun together.

5. Rewards: Team members feel valued.

- Ideas and work are acknowledged.
- Attempts to build knowledge and skills are supported.
- Compensation for work is fair.
- There are opportunities for professional growth.

The five R's model is used with permission from the Institute for Conflict Analysis and Resolution, *Introduction to Negotiations and Conflict Resolution* (George Mason University, 1992).

Appendix 23

Phases of Group Development

It is helpful for staff to understand that working as a team has its challenges as well as its rewards. The following model outlines how teams can reach performance levels by working through different stages. The model suggests that all groups go through processes of growth and maturation much like individuals do. In other words, the relationships of group members change as they experience working together over periods of time. Much like friendships, working relationships grow closer when members handle decision making and issue resolution effectively, and they grow farther apart when they do not. The model identifies the following four phases of group development:

Forming
Storming
Norming
Performing

The process of working through the phases is both linear and circular. That is, groups progress from one stage to the next stage, but they may also circle back through the stages when a new member joins the group and as the group faces new challenges. The process is evolutionary and dependent on the individuals involved. Every group reflects the individuals in it and their reactions to situations and to one another. It is this dynamic nature of teamwork that can make the adventure taxing and also exciting and rewarding.

The following descriptions present information on the four stages of group development and how a manager can facilitate the process.

Phase 1: Forming

This is the beginning stage when the group established itself. The issues revolve around purpose and membership and what the group is all about. In this stage members test each other out and depend upon the leader for direction. Members get to know one another and try to figure out what the norms are and how the group is going to function. Often, little work gets done at this stage because the rules are still not clear. "Forming" also happens to some extent when a new member joins an existing team.

There are things that teams can do to help the group begin to bond. Even something as small as learning each other's names is important to teamwork. Staff can create a photo page of Peace Corps staff and PST staff so that everyone can learn names quickly. Three-sentence biographies can be placed beside each photograph. Groups can develop a list of norms that they can refer to throughout PST preparation and PST and possibly expand during Phase 3: Norming. It is often helpful for people to discuss in a group their statements of work and identify where they are interdependent. In addition, teams should participate in activities that provide opportunities for the group to discuss how they feel their teamwork is progressing.

Phase 2: Storming

"Storming" refers to any argument or overeagerness that occurs. Disagreement can occur in other phases of group development too, but it seems to be the main characteristic of this second stage. Team members may react to each other with defensiveness or competition. They may take sides or resist getting down to the task because they are concerned about how they will be seen and how much influence they will have in the group. If the group does not move beyond this stage, it can get polarized.

When staff realize that "storming" is a natural part of the process, they may be more willing to address issues and work toward resolving them.

Scheduled meetings can be used to prevent and address issues. It is helpful to hold

- weekly staff meetings of senior management.
- biweekly staff meetings with all staff.
- short morning meetings during the PST preparation workshop.
- weekly management meetings of programming and training staff during PST.

In the meetings staff

- review what happened during the past week.
- celebrate accomplishments.
- preview current and future work.
- address issues.

Phase 3: Norming

In this stage, the customs, roles, and behavior of group members become clearer. Norms develop in response to how people treat one another and approach each task. Communication among staff members becomes deeper as people trust each other more. The group's goals become clearer and a "team spirit" may emerge. Real work starts to be accomplished.

It is important for the group to review their norms and modify them if necessary.

Phase 4: Performing

This stage is reached only after the group has successfully navigated the first three stages. In this stage, the group's objectives are best accomplished. People function well together and are more interdependent. They collaborate on activities, with individuals sharing leadership functions and contributing to the group through individual skills and strengths.

During this phase staff take time for reflection, discuss their performance, and identify dynamics that are supporting or getting in the way of their work. It is also important to take time to celebrate successes and to enjoy one another's company outside of the workplace.

The group development model is used with permission from Mark Sanborn, *Teambuilt: Making Teamwork Work* (Koen Book Distributors, 1994).

Appendix 24

Diversity in the Peace Corps

The Peace Corps is committed to the dignity, respect, and success of *all* trainees, Volunteers, and staff. It is important, therefore, for staff to address the topic of diversity. This refers not only to America's diversity but also to the diversity within the Peace Corps staff. Diversity includes differences in age, sex, professional experience, sexual orientation, ethnicity, and religion, among other characteristics.

In many Peace Corps posts, programming and training staff join a team of colleagues from different regions and ethnic backgrounds within the host country. This is not always an easy scenario, for, like Americans, many host country nationals have not had the opportunity to learn and appreciate the *value* of diversity. Diversity may present challenges to staff. It is important that these challenges be discussed so that staff, trainees, Volunteers, and even community members can develop the necessary skills to work collaboratively. The matrix below offers a way for staff to begin to explore the role that diversity plays in their group and what they can do to optimize differences.

Diversity Matrix

Instructions: The column on the left (What?) identifies categories of cultural diversity that bear special significance in the Peace Corps context. In the column in the center (So What?) write how you think the particular aspect of diversity might play out within the group and the impact it might have. (While the example reflects the topic of staff diversity, this matrix can be used to explore the impact of diversity on and response to diversity of trainers, trainees, Volunteers, and even community members.) In the column on the right (Now What?) include the possible responses to the challenges and opportunities that each category represents. Write your answers and then discuss your responses with your team members.

What? *Diversity Categories*	**So What?** *Impact*	**Now What?** *Responses*
Age	Example: Younger staff may defer to older staff.	Example: Call on different people for responses. Pair younger staff for projects to highlight their strengths to the rest of the group.
Sex		
Professional Experience		
Married/Single		
Ethnicity **Tribal Origin**		
Sexual Orientation		
Religious Orientation		
Other		

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